



Big Sky Country

-- tourism in montana --

June 2008





Bed Tax Revenue

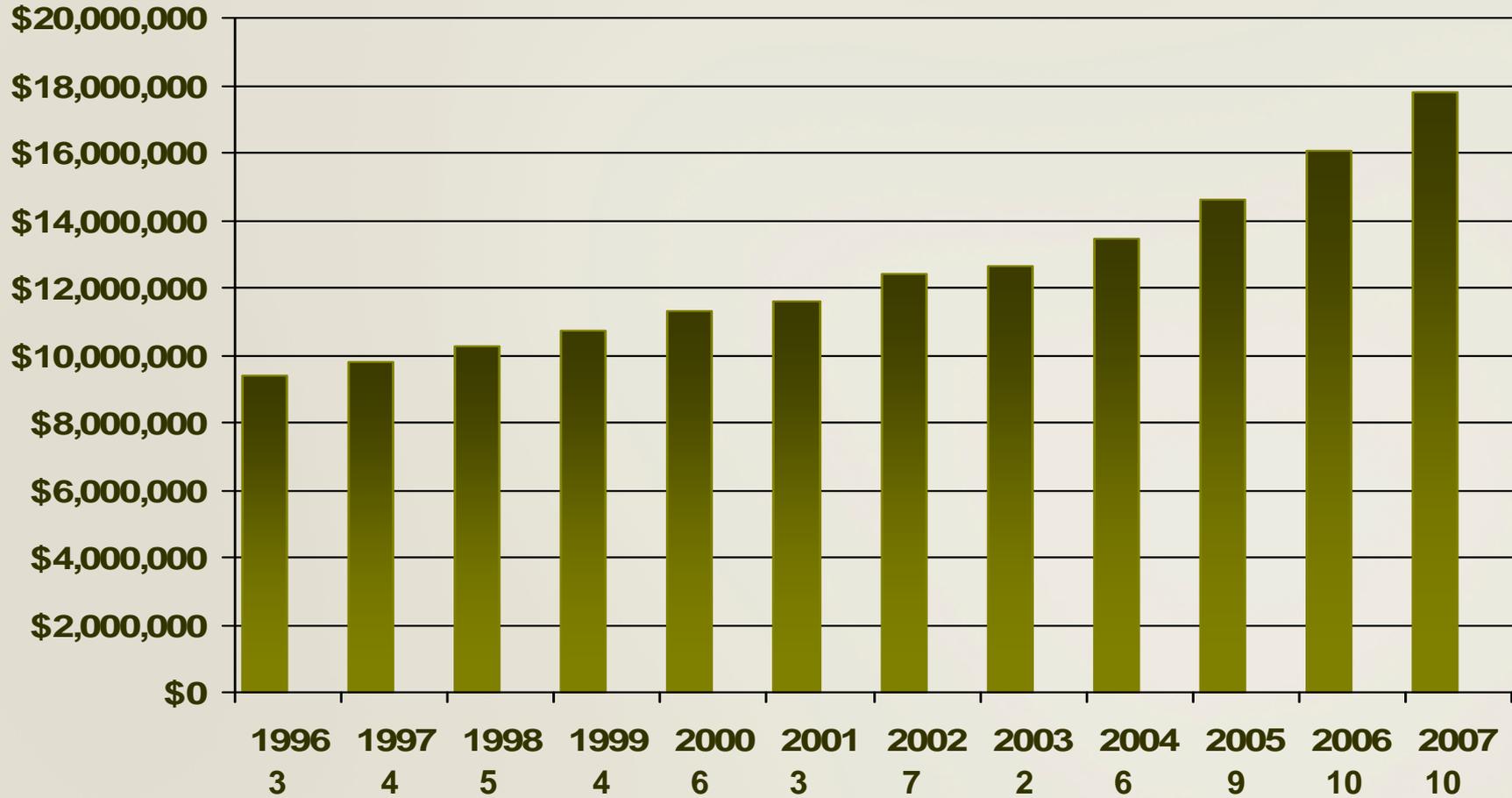
In 1988, the first year Montana collected the 4% Bed Tax, \$4.8 million was generated.

In 2007, that figure was \$17.8 million.

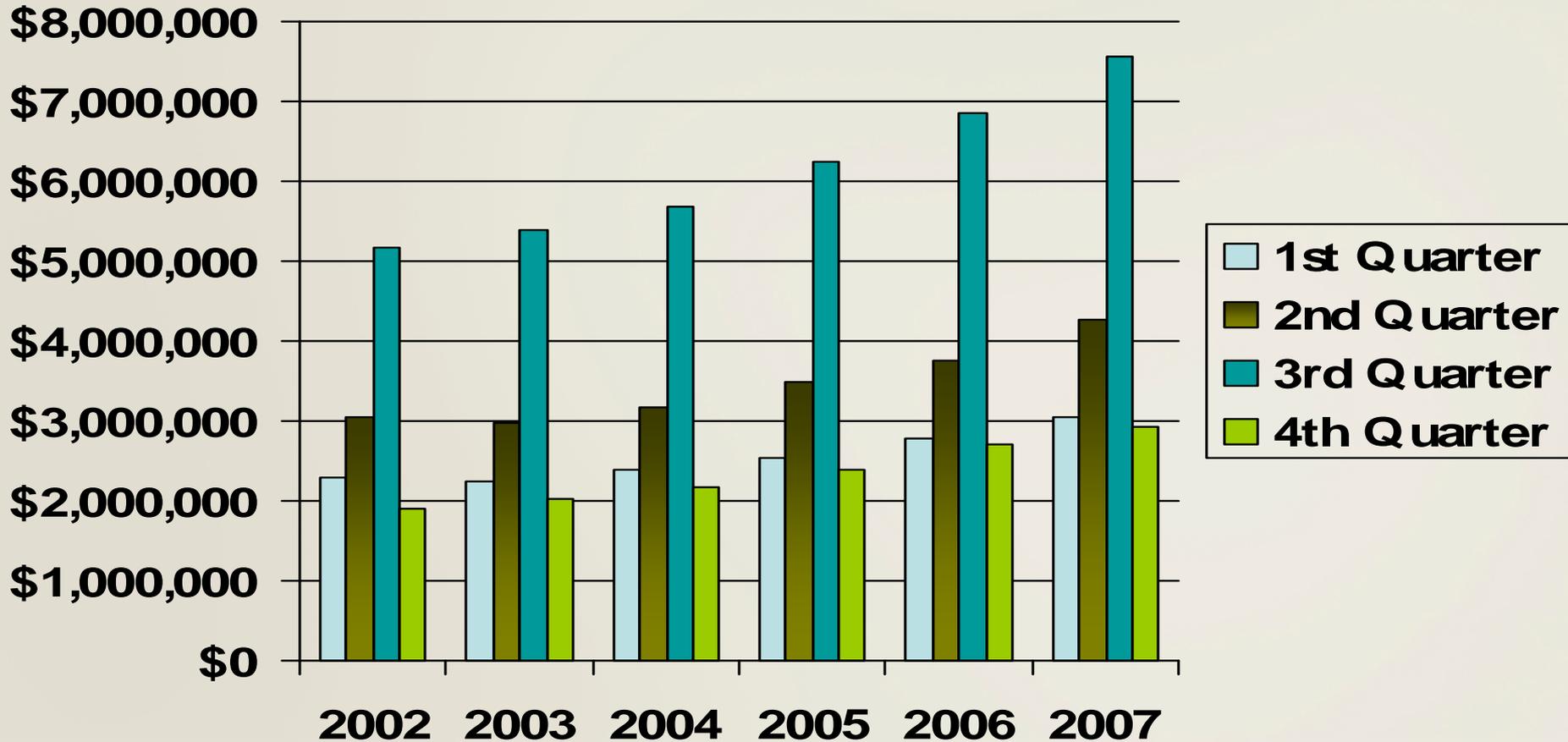


Bed Tax Collections

1996-2007



STATEWIDE BED TAX REVENUE





Bed Tax Legislation

- 1987 Legislation
 - Enacted 4% Accommodations Tax (Bed Tax)
- 2003 Legislation
 - Enacted additional 3% to Bed Tax - totaling 7% Bed Tax
 - Tax reform to offset reduction in personal income tax and capital gains tax
 - New 3% goes directly into General Fund



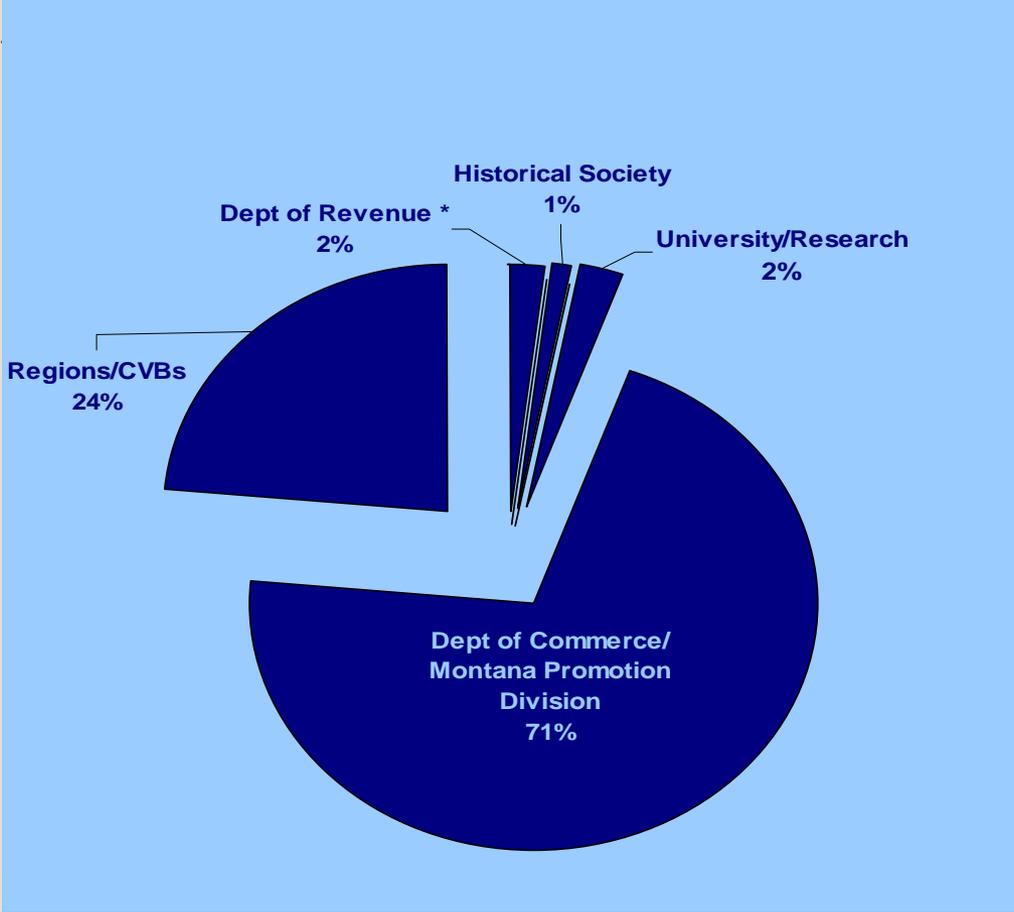


Bed tax helps fund promotion and infrastructure via:

- Montana Historical Society
- Virginia City/Nevada City
- Montana State Parks
- Montana Trade Program
- University System (tourism research)
- Regions/CVBs
- Travel Montana



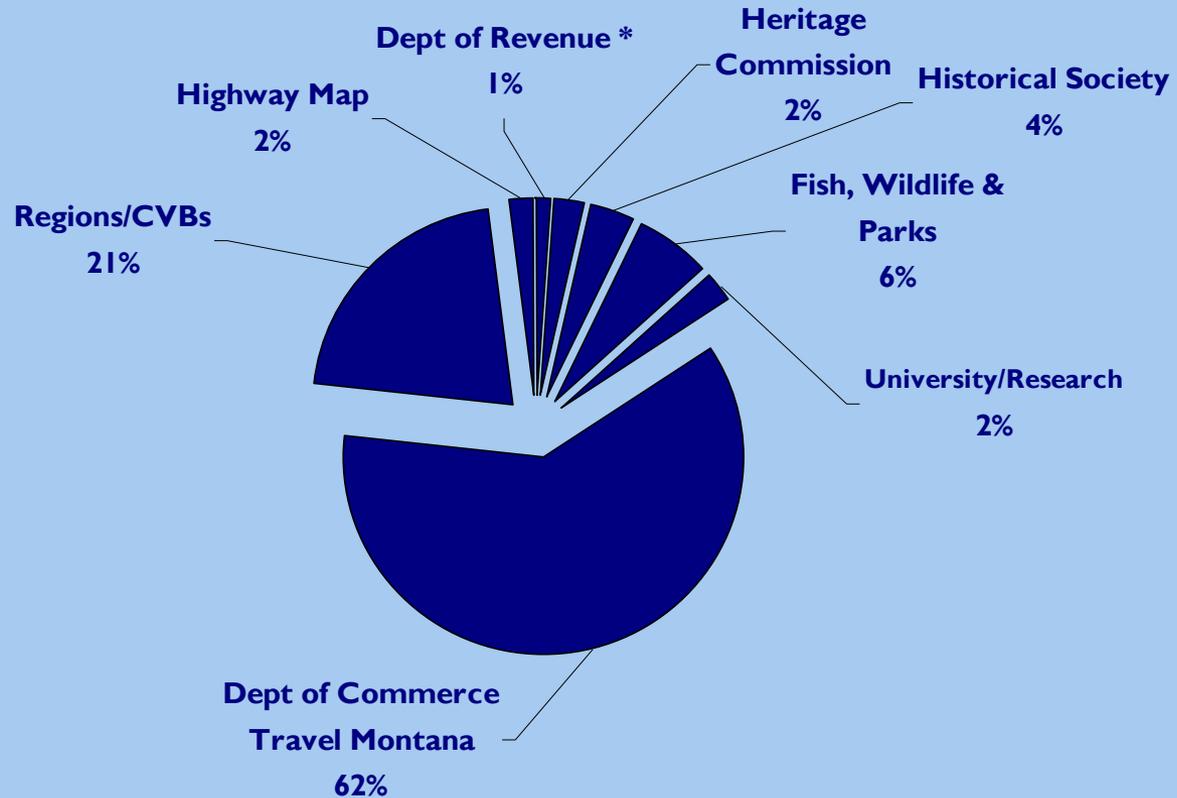
Bed tax distribution FY88 (Original)



bed tax distribution

FY07

(including administrative appropriations)





Tourism is Competitive Business

State Tourism Promotion Budget Ranking

- FY93 - ranked 15th in the nation
- FY08 - ranked 32nd in the nation

MPD's promotion budget is 40% lower than our competitors

- FY08 average state tourism budget: \$17,590,220
- FY08 MPD budget: \$10,497,336

Source: TIA





Montana's Opportunities

- Exchange rate has made the U.S. traveler more likely to stay in the U.S.
 - Montana is an affordable destination.
 - 9th most affordable destination in the U.S. (AAA)
- 1 in 4 Americans partake in outdoor recreation and/or visit a state or national park while on vacation
(TIA Domestic Market Travel Report, 2003)
 - The two top sites visited in Montana are Yellowstone National Park and Glacier National Park. (ITRR)
 - 2007 was a banner year for visitation in both parks.
- RV travel is growing
 - One in ten RV owners, wants to visit Montana.
(2005 Univ. of Michigan Study)
 - Despite increasing gas prices, RV vacations are more economical than other forms of vacation.
(Recreation Vehicle Industry Association 2005 Study)





Montana's Challenges

- While non-resident visitation has been growing, our percentage of vacationers has decreased.
 - From 2001-2005, those primarily in Montana for vacation decreased 8%. (From 41% to 34%).
 - VFR increased 14% to 19%
 - Passing-thru increased 24% to 27%
- Need to spread visitation into shoulder seasons

Source: ITRR



Smith Travel Research Year to Date 2006-2007

Segment	Occupancy Percent		
	2006	2007	% Chg
United States	63.3	63.2	-0.2
Mountain	66.1	66.5	0.6
Montana	59.8	61.6	3.0
Billings, MT Area	63.8	67.2	5.3
Bozeman/Yellowstone Area	59.0	61.3	3.9
Missoula/Butte	60.9	62.7	3.0
Helena/Great Falls	61.5	63.1	2.6



Smith Travel Research Year to Date 2006-2007

Segment	Average Room Rate		
	2006	2007	% Chg
United States	97.89	103.64	5.9
Mountain	94.66	100.20	5.9
Montana	68.82	75.14	9.2
Billings, MT Area	63.36	68.74	8.5
Bozeman/Yellowstone Area	77.73	82.84	6.6
Missoula/Butte	68.75	75.04	9.1
Helena/Great Falls	65.55	70.68	7.8



Smith Travel Research Year to Date 2006-2007

Segment	RevPAR		
	2006	2007	% Chg
United States	61.96	65.50	5.7
Mountain	62.60	66.67	6.5
Montana	41.15	46.25	12.4
Billings, MT Area	40.45	46.22	14.3
Bozeman/Yellowstone Area	45.83	50.82	10.9
Missoula/Butte	41.86	47.02	12.3
Helena/Great Falls	40.30	44.62	10.7



Smith Travel Research Year to Date 2006-2007

	Rev	Supply	Dem
Segment	% Chg	% Chg	% Chg
United States	7.2	1.4	1.2
Mountain	6.9	0.4	1.0
Montana	13.8	1.3	4.2
Billings, MT Area	15.4	1.0	6.4
Bozeman/Yellowstone Area	13.8	2.6	6.7
Missoula/Butte	10.7	-1.4	1.4
Helena/Great Falls	10.6	-0.1	2.6





National Tourism Trends

- Niche Markets
 - Girlfriend Getaways, Mancations, Destination Weddings, Voluntourism, Pet Travel, Culinary Travel
- Geotourism
 - Authentic experiences
- Social Networking - Web 2.0
 - 73% of internet users used one or more social media tool in travel planning. (TIA/Am Ex 2007 Study)
- Green Tourism
 - More than 50% of Americans are more likely to select a business that practices environmental responsibility. (TIA/TravelHorizons 2007 Study)



Non-Resident visitors in millions





Visitors spent \$3.1 billion in 2007

- That's over \$3,000 for every man, woman and child in Montana.
- These expenditures produced \$235 million in state and local taxes.
- That's a \$631 tax subsidy per Montana household.

Population (CEIC 2007 estimate): 957,861
Montana household (CEIC 2007 estimate): 2.5 ppl
Total Households (CEIC 2007 estimate): 372,190



Where does the \$3.1 billion get spent?

- 28% Gas.....\$866.1 million
(which generates nearly 36% of Montana's state gas taxes)
- 21% Restaurant.....\$656.0 million
- 16% Retail Sales.....\$485.6 million
- 9% Lodging.....\$288.5 million
- 8% Groceries.....\$260.8 million
- 5% Auto Rental/Repairs.....\$145.2 million
- 4% Outfitters/Guides.....\$133.2 million
- 8% Other.....\$250.1 million



Visitor Expenditures create jobs

- Tourism supports 44,830 Montana jobs – 7% of the total work force.
- These jobs generate \$1.05 billion in personal income.



The effect ripples through your community

- The tourism industry spends money on legal and professional services, utilities, insurance, entertainment, food and beverage, automotive and much more.





Montana nonresident visitor facts

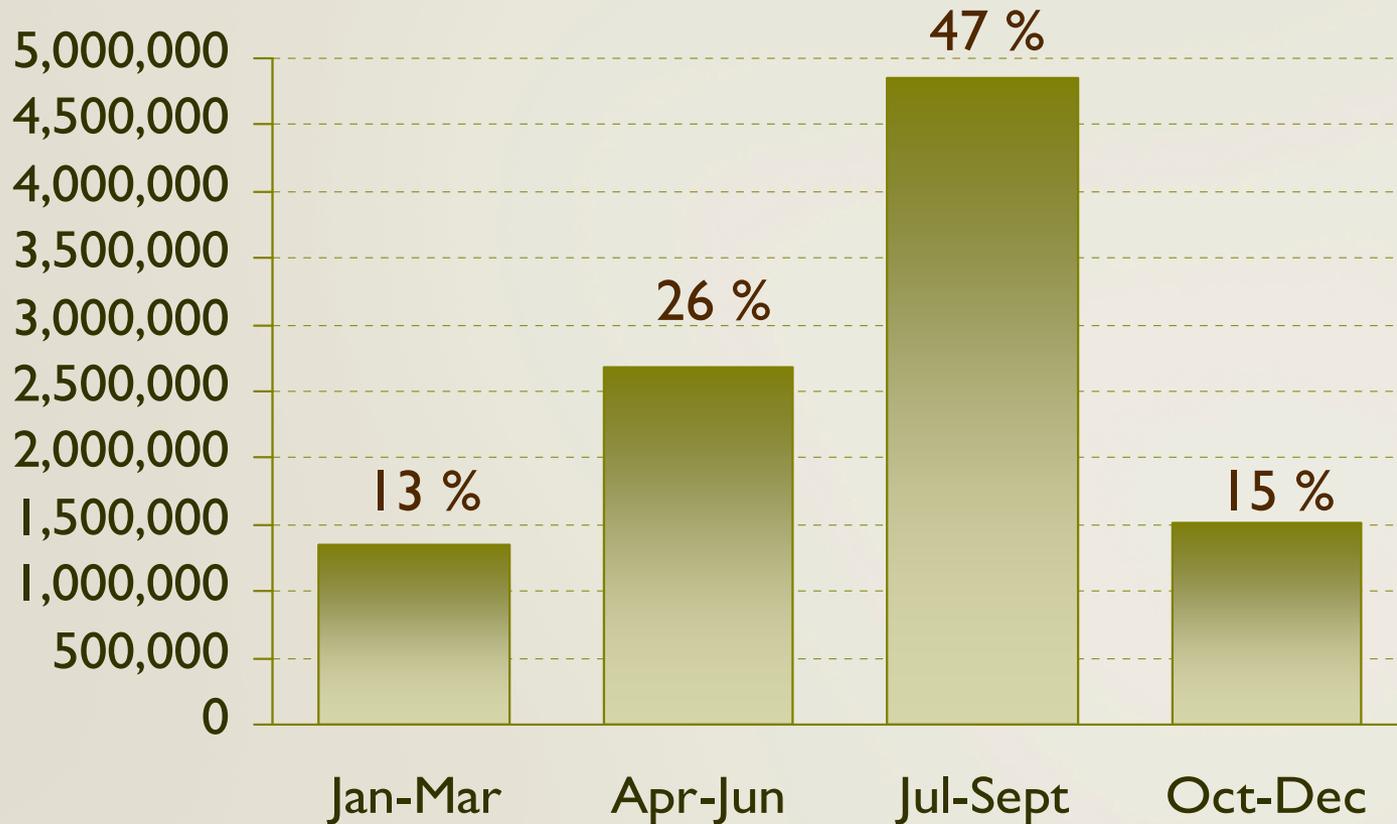
10.7 million nonresidents visited Montana in 2007.

Primary purpose of visit:

- 34% vacationers
- 19% visiting family and friends
- 13% business travelers
- 27% passing through
- 8% shopping, medical, other



Nonresident visitors by season





Who is Our Visitor?



Montana Visitor Facts

Primary Attractions for Vacationers:

- 22% Yellowstone NP
- 18% Mountains/Forests
- 16% Family & Friends
- 14% Glacier NP
- 13% Open Space
- 6% Wildlife/Fish



Montana Visitor Facts

Top Sites Visited by Vacationers:

- 48% Yellowstone NP
- 29% Glacier NP
- 12% Little Bighorn Battlefield
- 10% Other Montana State Parks
- 8% Flathead Lake State Parks
- 8% Virginia/Nevada Cities



Montana Visitor Facts

Vacationers Top activities in Montana:

Driving for pleasure

Wildlife Watching

Day Hikes

Recreational shopping

Picnicking

Historic sites

Museums

Lewis & Clark sites

Nature Study

Camping

Fishing





Montana Visitor Facts

Vacationers Place of Residence:

Washington (10%)

California (7%)

Idaho (7%)

Minnesota (5%)

Utah (5%)

North Dakota (4%)

Wyoming (4%)

Alberta (4%)

Colorado (4%)



ITRR Report Builder

itrr.umt.edu/reportbuilder.htm

Institute for Tourism and Recreation Research - Report Builder - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://www.itrr.umt.edu/reportbuilder.htm> Go

Links

ITRR

The University of Montana

- Home
- Customize Your Report
- Niche News
- ITRR Reports
- MT Statistics
- Other Publications
- Related Links
- Site Map
- Contact



Nonresident Visitor Data Set (2005)

Data for this study has been weighted to represent the entire nonresident travel population. Information on data collection methods and analysis is found in [Methods and Analysis - 2005 Nonresident Study Niche News](#).

Report Builder Instructions:

- 1) Select the type of report you would like to create from the following options: Expenditures, traveler demographics, trip characteristics, trip satisfaction, or trip planning.
- 2) Select your next search criteria from the following: All year, quarterly, location (travel region, county, city, or site), traveler characteristics (activities, purpose of trip, or what attracted vacationers to Montana), demographics (group type, age, income, or residence), or trip planning (flexibility on trip, media influence, sources used for planning or during the trip).
- 3) Select the report format of either PDF or Excel. You must have either Adobe Reader or Microsoft Excel on your computer to view the report. You can download Adobe Reader for free at the [Adobe website](#).
- 4) **This is a work in progress. If you suspect a glitch in our program contact us immediately at itrr@umt.edu so the problem can be addressed. Also, please send all of your questions and feedback to the same email address. Thanks for your help.**

[Continue to Reporting System](#)

Internet



Nonresident Travel Survey Reporting System

[Go To ITRR Home Page](#) **ITRR**

1. Select the report to create:

Trip Planning

2

Trip Planning

Trip Satisfaction

Trip Characteristics

Traveler Demographics

Expenditures Report

3. Select the report format:

PDF Excel

Create Report



Nonresident Travel Survey Reporting System

[Go To ITRR Home Page](#)

1. Select the report to create:
Trip Planning

2. Select a search:
Search All Year

- Search All Year
- Search By Quarter
- Search by Location
- 3** Search by Traveler Characteristics
- Search by Traveler Demographics
- Search by Trip Planning

Create Report



Nonresident Travel Survey Reporting System

[Go To ITRR Home Page](#)

1. Select the report to create:

Trip Characteristics

2. Select a search:

Search by Location

Search by Travel Region Search By County Search By City Search By Montana Site

This search will limit the sample to travelers who:

Spent at least one night in the following cities OR Drove through the following cities

Big Sky Bozeman Dillon Great Falls Kalispell Missoula West Yellowstone

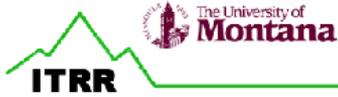
Billings Butte Gardiner Helena Livingston Red Lodge Whitefish

3. Select the report format:

PDF Excel

Create Report

Report for West Yellowstone Characteristics of Non-Residents



Friday, October 19, 2007

Nonresident Traveler Characteristics Report

This report summarizes nonresident visitors to Montana who fit the following criteria:

Spent at least one night in (cities): West Yellowstone

This group represents a sample size of 424 respondents, or 7.1% of all nonresidents (736,372 visitors).

Group Characteristics

- 67 % are repeat visitors to MT
- 67 % plan to return within 2 years
- 33 % are first time visitors to MT
- 27 % rented an automobile
- 27 % flew on a portion of their trip
- 9 % hired an outfitter
- 7 % have lived in MT before
- 6 % own a 2nd property in MT
- 4 % rented an RV
- 1 % rented a motorcycle
- 1 % are purchasing property in MT

Sites Visited On Trip

- 92 % Yellowstone National Park
- 24 % Glacier National Park
- 18 % Virginia/Nevada City
- 9 % Other Montana State Parks
- 9 % Little Bighorn Battlefield
- 6 % Museum of the Rockies, Bozeman
- 6 % Flathead Lake State Parks
- 5 % Lewis & Clark Caverns
- 4 % Lewis & Clark Interpretive Ctr, Great Falls
- 4 % Missouri Headwaters State Park
- 4 % National Bison Range
- 4 % Lolo Pass Interpretive Center
- 3 % Big Hole Battlefield
- 3 % Bighorn Canyon Nat'l Recreation Area
- 3 % Clark Canyon Reservoir
- 3 % Bob Marshall Wilderness
- 2 % Lost Trail Pass
- 2 % Pompey's Pillar
- 2 % MT Historical Museum, Helena
- 2 % Lemhi Pass
- 2 % Fort Peck Lake
- 1 % Bannack State Park
- 1 % Makoshika State Park

Activities

- 85 % driving for pleasure
- 83 % wildlife watching
- 43 % shopping
- 42 % picnicking
- 38 % day hiking
- 36 % visiting historical sites
- 26 % visiting museums
- 25 % nature study
- 24 % developed camping
- 21 % visiting L&C sites
- 17 % fishing/fly fishing
- 11 % visiting Native American sites
- 9 % snowmobiling
- 9 % birding
- 8 % visiting festivals or events
- 6 % gambling
- 6 % road/tour biking
- 6 % horseback riding
- 5 % river rafting/floating
- 5 % backpacking
- 4 % primitive camping
- 4 % canoeing/kayaking
- 3 % mountain biking
- 3 % motorboating
- 3 % art exhibits
- 3 % sporting event
- 2 % attending performing arts
- 1 % off highway riding/ATV
- 1 % golfing
- 1 % downhill skiing
- 1 % cross-country skiing

Institute for Tourism and Recreation Research
College of Forestry & Conservation
32 Campus Drive #1234
The University of Montana - Missoula
Phone (406) 243-5686



Friday, October 19, 2007

Nonresident Traveler Characteristics Report

Reasons for trip	
primary	all
82 % Vacation/recreation/pleasure	94 %
6 % Just passing through	15 %
5 % Business/convention/meeting	5 %
5 % Visit friends/relatives/family event	16 %
2 % Other	5 %
0 % Shopping	5 %

Length of stay	
Of nights spent in MT	
73 % of nights spent in Yellowstone Country	
13 % of nights spent in Glacier Country	
6 % of nights spent in Gold West Country	
4 % of nights spent in Custer Country	
2 % of nights spent in Russell Country	
1 % of nights spent in Missouri River Country	

Lodging: Of nights spent in MT	
61 % Hotel/motel	
13 % Private campground	
6 % Home of friend/relative	
6 % Public land camping	
5 % Rented cabin/home	
3 % Second home/condo/cabin	
2 % Resort/condo	
2 % Guest ranch	
1 % Vehicle in parking area	
0 % Other	

If on vacation, attracted to Montana for ...	Primary Attraction
90 % Yellowstone National Park	82 %
55 % Mountains/forests	11 %
36 % Open space/uncrowded areas	6 %
31 % Rivers	0 %
27 % Glacier National Park	10 %
25 % Wildlife/fish	3 %
22 % Lakes	1 %
14 % Lewis & Clark sites	1 %
12 % Family/friends	4 %
10 % Native american history & culture	0 %
9 % MT history & culture	0 %
6 % Northern great plains/Badlands	0 %
3 % A Montana State Park	0 %
2 % Resorts	0 %
2 % Dude/guest ranch	1 %
2 % Special events	1 %

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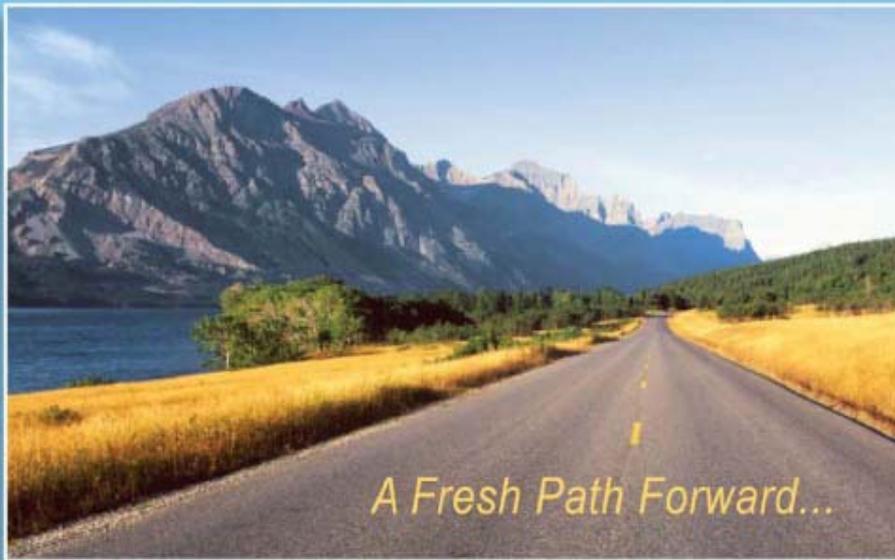
Montana's Partners in Tourism Promotion

Montana is divided into SIX tourism regions
and
ELEVEN Convention and Visitors Bureaus
(CVBs)



State - Regions - CVBs





A Fresh Path Forward...



MONTANA
BIG SKY COUNTRY

Tourism and Recreation Strategic Plan 2008-2012

Prepared for Montana's Tourism & Recreation
Partnership Stakeholders

MONTANA
BIG SKY COUNTRY



Strategic Plan Purpose

- Define VISION
- Identify GOALS and ACTIONS
- Set PRIORITIES
- Assign RESPONSIBILITIES
- Ask BIG PICTURE questions...

The purpose of the Strategic Plan was to determine Montana's desire for what tourism should become by 2012 and then identify a path to get there.





Goals for Tourism & Recreation 2008-2012

- 1. Increase four-season tourism revenues statewide through effective marketing and promotions, focusing on high-value, low impact visitors**
- 2. Attain public policy and citizen support for sustainable tourism and recreation**
- 3. Address management and access issues for sustainable recreation on state and federal lands**
- 4. Enhance and preserve Montana's culture and history (historic sites, museums, art, music, etc.)**
- 5. Support appropriate business growth, including new tourism products and services for target customer markets**





Goals for Tourism & Recreation 2008-2012

6. Address tourism and recreation professional development, workforce availability, and affordable housing issues
7. Improve Montana's transportation system for both residents and visitors
8. Enhance the "curb appeal" of Montana communities to attract visitors
9. Enhance funding to maintain sustainable tourism and recreation in Montana
10. Build an effective "team" to implement the Strategic Plan, and report results



High-Value/Low-Impact

“High-Value/Low-visitors” are defined visitors who seek a experience, stay longer, spend per day, and respect Montana’s natural and cultural assets.





Uncovering Montana's Brand





A BrandIs

- Essential attributes that distinguish a product, good or service from its competitors
- Direct/indirect consumer experience
- Consumer perception of people who use the product
- Strategic roadmap for advertising, marketing and promotion





A Brand....is NOT!

- Advertising slogan or tagline
- Clever play on words that requires explanation
- Consensus statement that captures every possible attribute, instead of the strongest
- Something that changes from year to year





Branding process

- **Branding Advisory Committee**
 - Strategic Plan goals
 - ITRR research
- **Out-of-state Focus Groups (Aug)**
- **In-state Stakeholder Workshops (Nov)**
- **Branding Advisory Committee Summit (Dec)**
 - Summary of consumer research & stakeholder workshops.
 - Presentation of draft branding statements





Branding process

- **Consumer Testing of Branding Statements (Feb)**
 - Online, out-of-state market test interviews
- **Presentation of final Brand Statements (Mar)**
- **Refining of final Brand Statements (Apr)**
- **Public presentation of final Brand Statements**
 - Governor's Conference on Tourism & Recreation, West Yellowstone, April 19, 2008



WHAT MONTANA OFFERS

ATTRIBUTES

STRENGTHS (in vacuum)

- Natural beauty (Glacier, Water, Mountains)
- Open spaces
- Wildlife - diverse/abundant
- Fewer people
- Rugged perception/wild flavoring/Old West
- People (friendly, easy going, laid back)
- National parks/monuments
- Recreation/outdoors
- Unique historic and natural aspects
- Art culture and cultural opportunities

WEAKNESSES

- Remote
- Don't look like me
- Lack high touch customer service
- Unfamiliar
- Not different enough
- Perceived risk
- Inconveniences



Final Brand Platform

- More spectacular unspoiled nature than anywhere else in the lower 48 United States
- Vibrant and charming small towns that serve as gateways to the natural wonders
- Breathtaking experiences by day, relaxing hospitality at night



Final Brand Platform

- More spectacular unspoiled nature than anywhere else in the lower 48
 - Key Point of Differentiation
 - Builds on the core strength of the Montana tourism product
 - Leverages positive associations with Alaska
 - Captures “spirit of adventure” “great outdoor experience” and “unbeaten path”
 - Need to “iconify” 8 – 10 particular locations
 - Glacier NP, Yellowstone NP, Flathead Lake, Bob Marshall, Bitterroot, Continental Divide, etc
 - Crown of the Continent is a strong start



Final Brand Platform

- Vibrant and charming small towns that serve as gateways to the natural wonders
 - Mitigates “remote” with image of pockets of visitor services
 - Captures “comfort” and “charm” needs of audience
 - Shifts focus from communities as destinations to communities as gateways



Final Brand Platform

- Breathtaking Experiences By Day
 - Conveys exhilaration
 - Both physically and/or visually breathtaking, depending on the interests of the audience
 - Leverages “spectacular unspoiled nature” into a personal experience
 - “Experiences” not “adventures”
 - “Experiences” is softer, broader, more accessible than “adventures”





Final Brand Platform

- Relaxing hospitality at night
 - Low key
 - Conveys comfort, sense of warmth, welcome
 - Not lavish or lush
 - That's not credible with the audience
- Day/Night
 - Suggestive of a balance between exhilaration and comfort
 - Not meant to be restrictive





Final Brand Platform

- Using the Brand Platform
 - Example: Las Vegas
 - Unique adult entertainment escape (Brand)
↓
 - What Happens Here, Stays Here (Creative)
 - Internal Road Map
 - Not consumer focused language
 - The focus is on first time visitors
 - Strongest appeal to convert non-visitor targets to visitors
 - Repeat visitors will explore depth and breadth of the Montana offering





Final Brand Platform

- Designed to work together
 - Statement One - Differentiator
 - Distinguishes Montana from competitor states
 - Statement Two - Mitigator
 - Mitigates “remote” without denying it
 - Statement Three – Brand Builder
 - Leverages strengths (nature) to drive up qualities audience desires (comfort, exhilaration)





Final Brand Platform

- Personalizing the story
 - Role for the people of Montana in the creative expression of the brand
 - Testing did not evaluate messengers, it evaluated message
 - Passionate Montanans can be strong messengers for the state, if they convey the brand platform
- United we stand.....
 - \$76 million in annual Montana tourism promotion
 - Major marketing weight IF unified around the brand platform
 - Major confusion in the marketplace if NOT unified around the brand platform





Next Steps

- **Brand Guidebook**
 - Fall 2008
- **Statewide roadshow and training**
 - Fall 2008
- **New Travel Montana Creative**
 - December 2008
- **Follow Up Tools and Templates**
 - Spring 2009





**Full branding presentation
can be viewed at:**

www.travelmontana.org/branding





Consumer Marketing





2008 Warm Season Campaign





Campaign Strategy

- Consistency across all TM promotions
- Limited dollars => super-targeted strategy
- Variety of media to reach geo- and lifestyle-targeted audiences





Warm Season Consumer Campaign

- National Campaign
- Key Market Campaign
- 3 Parks





National Campaign

- Print
- Internet
- Web Development





Print Campaign

Segments

- Traditional (Family)
- Active Mature
- RV / Camping
- Photography
- Outdoor Enthusiasts
- History / Culture
- In-flight
- Removed Bridal segment





Print Campaign

Publications

- AAA Tourbook
- AARP Magazine
- Alaska/Horizon Air
- History Channel
- Audubon
- Backpacker
- Budget Travel
- Better Homes & Gardens
- Good Housekeeping
- Madden Newspaper Insert
- National Geo Adventure
- National Geo Traveler
- NY Times T: Travel
- Outside
- Popular Photography
- Trailer Life
- Smithsonian
- Sunset
- Travel & Leisure





Print Co-ops

Good Housekeeping (8-page special section)

- Butte CVB
- Helena CVB
- Missoula CVB
- Custer Country
- Glacier Country
- Gold West Country
- Missouri River Country
- Russell Country
- Private partners: Glacier Park, Inc. & Red Lion Hotels





Print Co-ops

cont'd

Madden Pre-Print (8-page Newspaper Insert)

- Butte CVB
- Bozeman CVB
- Custer Country
- Glacier Country
- Gold West Country
- Great Falls CVB
- Helena CVB
- Missoula CVB
- Missouri River Country
- Russell Country
- Private Partners: Best Western Montana Hotels, Big Sky Resort, Fairmont Hot Springs, Best Western KwaTaqNuk Resort





Print Co-ops

cont'd

Audubon (5-page special section)

- Bozeman CVB
- Missoula CVB
- Custer Country
- Glacier Country
- Missouri River Country
- Russell Country





Print Co-ops

cont'd

National Geographic Traveler (one-page co-op)

- Big Sky CVB
- Bozeman CVB

Sunset (one-page co-op)

- Big Sky CVB
- Bozeman CVB

Travel & Leisure Family (one-page co-op)

- Helena CVB
- Russell Country

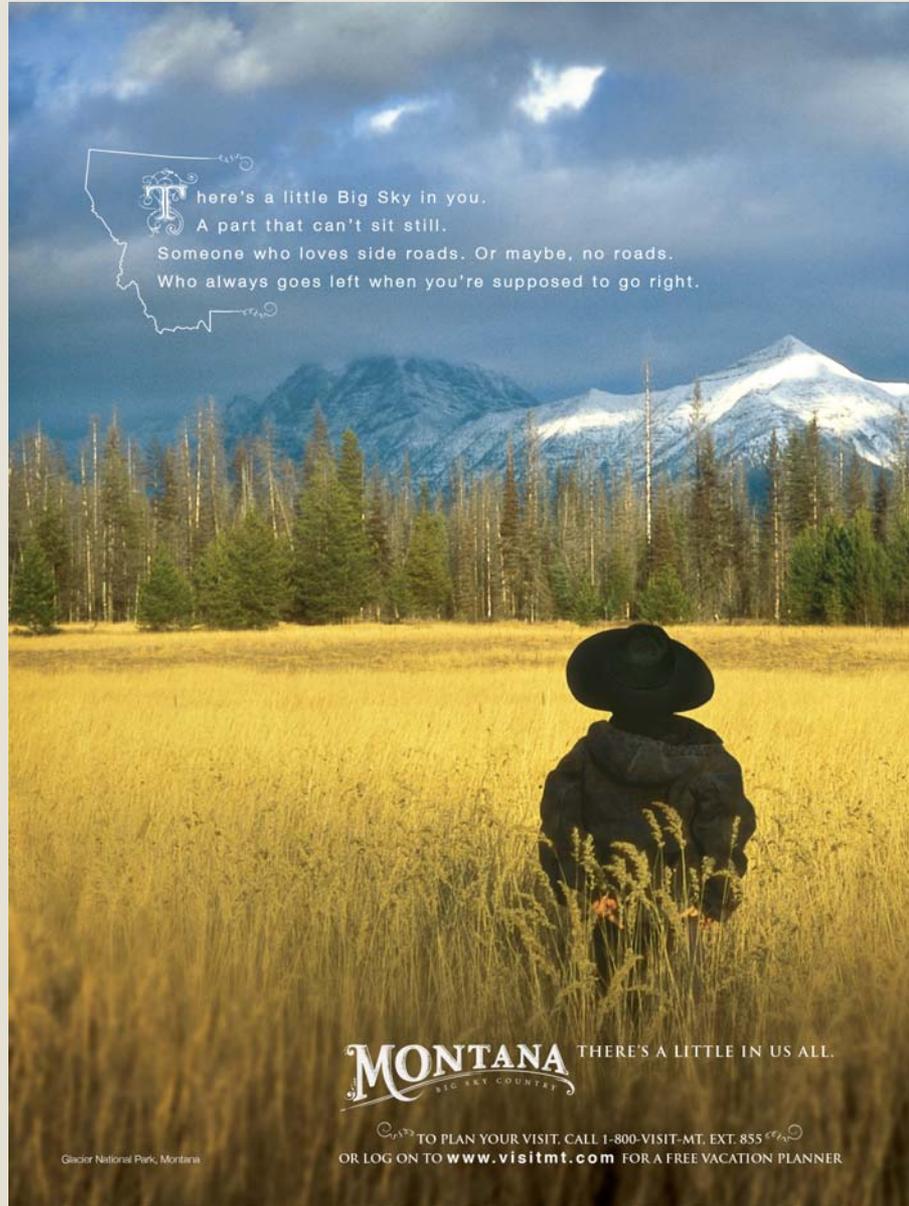




Print Campaign

- Campaign runs Feb 08 through July 08
- \$1,022,620.73
 - Co-op contribution: \$32,722.18 (3% of total)
- Circulation: 22,329,968
- CPM: \$45.80





There's a little Big Sky in you.
 A part that can't sit still.
 Someone who loves side roads. Or maybe, no roads.
 Who always goes left when you're supposed to go right.

MONTANA THERE'S A LITTLE IN US ALL.
BIG SKY COUNTRY

Glacier National Park, Montana

TO PLAN YOUR VISIT, CALL 1-800-VISIT-MT, EXT. 855
 OR LOG ON TO www.visitmt.com FOR A FREE VACATION PLANNER



Warm Season Print

MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce



There's a little live and let live in you.
 A little bit of wander.
 Unchanged. Unknown. Yet somehow, larger than life.
 It's the child part. The wild part.
 The part that keeps us on our toes.

MONTANA THERE'S A LITTLE IN US ALL.
 BIG SKY COUNTRY

Near Polebridge, Montana

TO PLAN YOUR VISIT, CALL 1-800-VISIT-MT. EXT. 844
 OR LOG ON TO www.visitmt.com FOR A FREE VACATION PLANNER



Warm Season Print

MONTANA
 BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

Here's a little cowboy in you.
A little part that walks the walk.
That'd run wild in a place full of teepees & t-bones.
It's the part that loves to say "just passing through."

MONTANA
BIG SKY COUNTRY

THERE'S A LITTLE IN US ALL.

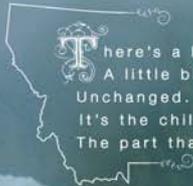
TO PLAN YOUR VISIT, CALL 1-800-VISIT-MT, EXT. 846
OR LOG ON TO www.visitmt.com FOR A FREE VACATION PLANNER

Montana Bar in Miles City, Montana

Warm Season Print

MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce



There's a little live and let live in you.
 A little bit of wander.
 Unchanged. Unknown. Yet somehow, larger than life.
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 The part that keeps us on our toes.

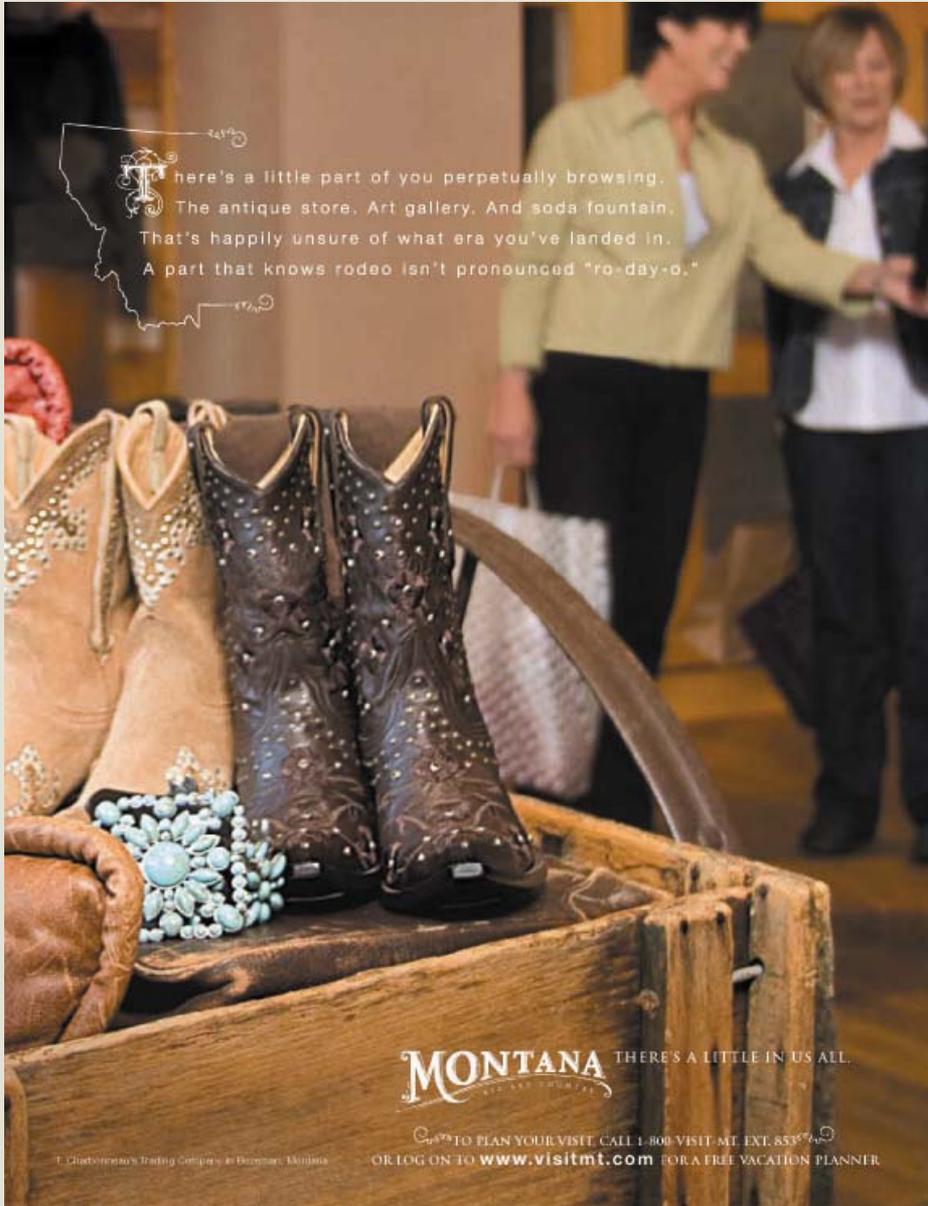
Iceberg Lake, Glacier National Park, Montana

MONTANA THERE'S A LITTLE IN US ALL
BEYOND THE MOUNTAINS
 TO PLAN YOUR VISIT, CALL 1-800-VISIT-MT. EXT. 841
 OR LOG ON TO www.visitmt.com FOR A FREE VACATION PLANNER



Warm Season Print
MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce



There's a little part of you perpetually browsing.
 The antique store. Art gallery. And soda fountain.
 That's happily unsure of what era you've landed in.
 A part that knows rodeo isn't pronounced "ro-day-o."

MONTANA THERE'S A LITTLE IN US ALL.
BIG SKY COUNTRY

T. Chatsworth's Trading Company in Decatur, Montana

TO PLAN YOUR VISIT, CALL 1-800-VISIT-MT. EXT. 853-7400
 OR LOG ON TO www.visitmt.com FOR A FREE VACATION PLANNER.



Warm Season Print
MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce

UPCOMING EVENTS

- | | | |
|--|---|--|
| GARDEN CITY BREWFEST
(Missoula) May 3, 2008 | RED LODGE MUSIC FESTIVAL
(Red Lodge) June 7-15, 2008 | AUGUSTA AMERICAN LEGION
RODEO & PARADE
(Augusta) June 29, 2008 |
| LEWIS & CLARK INTERPRETIVE
CENTER 10TH ANNIVERSARY
(Great Falls) May 4, 2008 | RED BOTTOM CELEBRATION
(Frazer) June 20-22, 2008 | NATIONAL FOLK FESTIVAL
(Butte) July 11-13, 2008 |
| LIVING HISTORY WEEKENDS
(Nevada City & Virginia City) Every
weekend starting May 23 - Labor Day | LIBBY LOGGER DAYS
(Libby) June 26-28, 2008 | SUMMERFAIR
(Billings) July 12-13, 2008 |
| MONTANA DINOSAUR FESTIVAL
(Malta) June 6-7, 2008 | CUSTER'S LAST STAND
REENACTMENT
(Hardin) June 27-29, 2008 | BITE OF BOZEMAN
(Bozeman) July 30, 2008 |

Montana Tourism Resources:

- | | | |
|--|--|--|
| MONTANA TOURISM OFFICE
1-800-VISIT-MT, ext. 825
visitmt.com | GOLD WEST COUNTRY
1-800-879-1159, ext. 807
goldwest.visitmt.com | GLACIER COUNTRY
1-800-338-5072
glaciertmt.com |
| RUSSELL COUNTRY
1-800-527-5348
russell.visitmt.com | MISSOURI RIVER COUNTRY
1-800-653-1319
missourinivervisitmt.com | CUSTER COUNTRY
1-800-346-1876, ext. 508
custercountry.com |
| HELENA CVB
1-800-743-5362
gohelena.com | BUTTE CVB
1-800-735-6814
buttecvb.com | MISSOULA CVB
1-800-526-3465, ext. GH-17
missoulacvb.org/house |
| GLACIER PARK, INC.
406-892-2525
glacierparkinc.com | BEARTOOTH
HARLEY-DAVIDSON/BUELL
1-877-292-0562
beartoothrentals.com | RED LION HOTELS
1-800-RED-LION
redlion.com |

**WE'LL GIVE YOU A NICE,
COMFORTABLE ROOM TO STAY IN.
AND 1,872 REASONS TO LEAVE IT.**

You won't want to leave when you stay at a Red Lion, but with our new online destinations guide, it will be hard not to. Find Montana's best attractions, restaurants, events and more just a click away when you visit us online. And, after you've seen the Treasure State's finest, relax in our new guest rooms, complete with plush pillowtop beds, triple sheeting, granite baths, ergonomic workspaces and free high-speed wireless Internet. Visit us today to see it all and **STAY COMFORTABLE.**



RED LION
HOTELS

redlion.com • 800-Red Lion



Montana Destinations: Helena • Kalispell • Missoula

9001106

Good Housekeeping Co-op





Pelicans congregate at the Medicine Lake National Wildlife Refuge in Northeastern Montana. Photographer: Donnie Sexton

world's last free-roaming black-footed ferret populations. And just south of Glendive, turkey vultures soar over Makoshika State Park, while chipping sparrows, Bullock's orioles and cedar waxwings fill the air with song.

As you head west towards Billings, don't forget your spotting scope! Pompeys Pillar National Monument offers a variety of birds on the Bureau of Land Management sensitive species list such as the ferruginous hawk, Franklin's gull, Forster's tern, loggerhead shrike, northern goshawk and the peregrine falcon. Gracing the stark prairies and plateaus north of Billings is

the Lake Mason National Wildlife Refuge with long-billed curlews, sage grouse and upland sandpipers.

Montana is a different kind of place. A place more comfortable with habitat than highways. A place where endangered species seem less so. Montana offers the most abundant and diverse wildlife experience in the lower 48 states. From birds to bears, from west to east, it is an unrivaled brush with the fauna of North America.

Montana Tourism Resources:

MONTANA TOURISM OFFICE
1-800-VISIT-MT, ext. 826
visitmt.com

GLACIER COUNTRY
1-800-338-5072
explore.glaciertmt.com

RUSSELL COUNTRY
1-800-527-5348
russell.visitmt.com

MISSOURI RIVER COUNTRY
1-800-653-1319
missouririver.visitmt.com

CUSTER COUNTRY
1-800-346-1876, ext. 808
custercountry.com

MISSOULA CVB
1-800-526-3465, ext. AN7
missoulacvb.org/audubon

BOZEMAN CVB
1-800-228-4224, ext. 803
am.visitbozeman.net

SEE WHERE BIRDS OF A FEATHER FLOCK

BIRDING TRAILS IN MONTANA'S RUSSELL COUNTRY

RUSSELL COUNTRY

GET A FREE BIRDING TRAIL BROCHURE/MAP
Call 800.527.5348 or visit russell.visitmt.com

WELCOME EAVESDROPPERS
Southeastern Montana Birding Trail

CUSTER COUNTRY
MONTANA

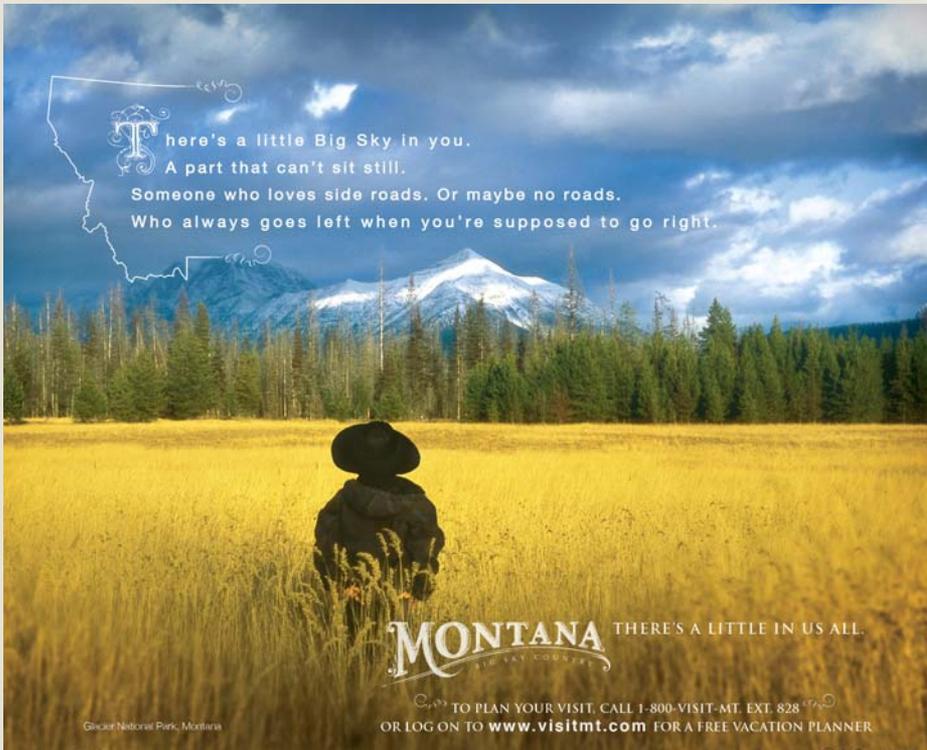
1-800-346-1876 ext. 808
www.CusterCountry.com

SOMETHING GREAT IS ABOUT TO TAKE FLIGHT.

MONTANA'S
MISSOURI RIVER COUNTRY

Montana's
Missouri River Country

Free birding trail map/brochure:
missouririver.visitmt.com
1-800-653-1319



There's a little Big Sky in you.
 A part that can't sit still.
 Someone who loves side roads. Or maybe no roads.
 Who always goes left when you're supposed to go right.

MONTANA THERE'S A LITTLE IN US ALL.
BIG SKY COUNTRY

Grand National Park, Montana

TO PLAN YOUR VISIT, CALL 1-800-VISIT-MT. EXT. 828
 OR LOG ON TO www.visitmt.com FOR A FREE VACATION PLANNER.

Montana
Helena ★

**IN HELENA, YOU'LL FIND A LITTLE BIT OF NEW
 AND A LITTLE BIT OF GOLD.**

Helena is that rare modern city that retains her legacy through an array of history and culture. From our provocative museums to our charming shops and delectable restaurants, we'll keep you fascinated in one of America's "Best Little Art Towns." We're between Yellowstone and Glacier National Parks. For a free planner, call 1-800-743-5362 or visit www.gohelena.com.



**BOOK A PLEASURE CRUISE
 IN MONTANA'S RUSSELL COUNTRY.**



Vacation in one of Big Sky Country's hottest destinations, Russell Country, where our legendary outdoor recreation and gracious people will have you coming back year after year. Each season holds the promise of a new Montana-style adventure for every member of your family. For a free planner, call 1-800-527-5348 or visit www.russell.visitmt.com.

Travel & Leisure Family Co-op



Montana Promotion Division · Department of Commerce

Celebrate National Trails Day in
MONTANA
 BIG SKY COUNTRY

In a state that's as big as all outdoors, you shouldn't be surprised to find that hiking and backpacking are the preferred leisure pursuits here. Long backpacking trips and short hikes through millions of acres of national forest and numerous wilderness areas are a rite of passage (or perfect date) for many Montanans. First kisses, wedding vows and even a business plan or two have all been hatched when some fun-loving Montanan felt the urge to "get out for awhile."

Montana's most famous backpacking destination is Glacier National Park. The park's main thoroughfare, Going-To-The-Sun Road, serves as a veritable 52-mile-long trailhead to more than 700 miles of trails. Most people leave the car behind to access a seemingly



Bull elk bugling in Yellowstone National Park. Photographer: Jason Lago

endless myriad of short nature walks, day hikes and multi-day slogs deep into unspoiled backcountry. All are reasons why Glacier is often deemed "The Backpacker's National Park." And rightfully so.

In contrast, Yellowstone National Park is set up for motorists. The area is roughly 63 miles north to south and 54 miles east to west- bigger than Rhode Island and Delaware combined - and interconnected nicely by a figure-eight loop. This provides a nice segue for those who like to get off the beaten path - over 1,000 miles of trails lead

in every direction. Easy half-day jaunts are typified by wildlife viewing and expansive valleys; other trails require know-how, backcountry skill and a set of fully functioning lungs.

Being bookended by two national treasures, some would be hard-pressed to hike anywhere else. But thanks to three million acres of designated wilderness, Montana is a virtual backpacker's decathlon. Areas to explore include the Bob Marshall Wilderness, south of Glacier National Park; the Bitterroot Mountains, south of Missoula; the Absaroka-Beartooth Wilderness, north of Yellowstone; the Crazy Mountains, east of Bozeman and Makoshika State Park, east of Glendive. For complete listings, visit www.fs.fed.us/r1

As passionate as Montanans are about wild places, they're equally passionate about protecting them. Nine Montana organizations including REI-Missoula and the Bob Marshall Wilderness Foundation are hosting National Trails Day events on July 7. National Trails Day is a long-standing celebration of America's magnificent trail systems and the countless supporters and volunteers that make it possible.

Thanks to conservation efforts, seven million acres of roadless wilderness make Montana the perfect place to celebrate National Trails Day, every day. So if you ever find yourself muttering, "I need to get out for awhile," we understand. There's a little Montana in us all. Some of us just don't know it yet.

For a complete list of National Trails Day events in Montana, visit www.americanhiking.org/events

..... WWW.VISITMT.COM



Lemhi Pass, Bitterroot Mountains, Montana. Photographer: Donnie Sexton

There's a little live and let live in you.
 A little bit of wander.
 Unchanged. Unknown. Yet somehow, larger than life.
 It's the child part. The wild part.
 The part that keeps us on our toes.

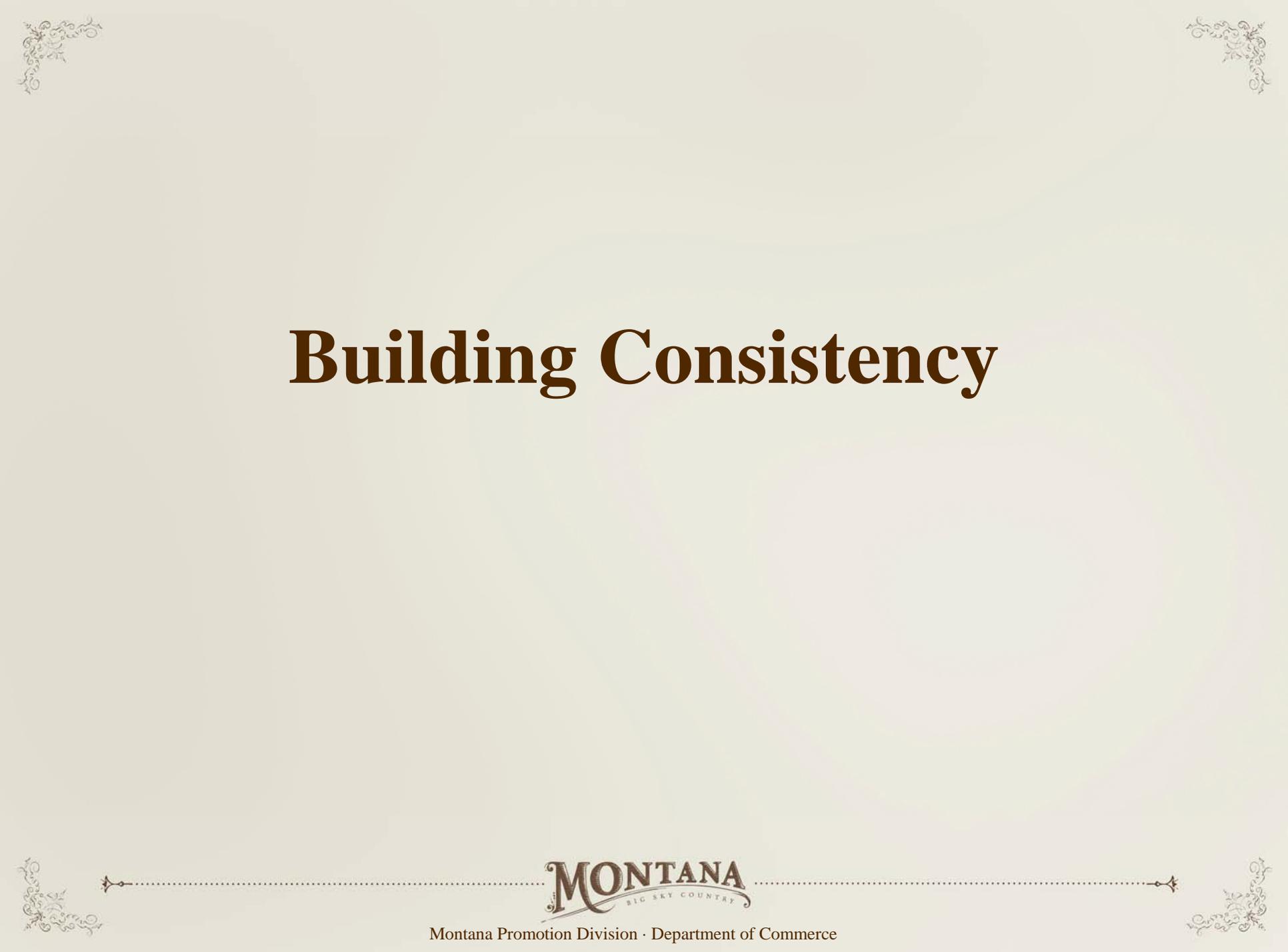


Iceberg Lake, Glacier National Park, Montana

THERE'S A LITTLE IN US ALL.
MONTANA
 BIG SKY COUNTRY
 TO PLAN YOUR VISIT, CALL 1-800-VISIT-MT, EXT. 834 OR LOG ON TO WWW.VISITMT.COM FOR A FREE VACATION PLANNER

Backpacker Advertorial Spread





Building Consistency



Special Advertising Section

MONTANA

BIG SKY COUNTRY

RECONNECT WITH YOUR INNER CHILD OR GIVE YOUR KIDS A WINTRY EXPERIENCE THEY'LL NEVER FORGET.

WINTER THE WAY YOU REMEMBER IT

Remember catching snowflakes on your tongue when you were a kid? How about making "snow angels" in a blanket of fresh fluff? And when was the last time you went sledding...down a neighborhood hill, behind a horse-drawn sleigh, or perhaps behind a string of excited doggies? With the down-home hospitality you remember from childhood and a healthy dose of the new and pleasantly unexpected, the magic of winter and all its possibilities comes to life in sparkling, sunny Montana.

Montana serves up something to satisfy every passion, from skiing and snowboarding to natural hot spring soaking, Cross-country ski, snowmobile or take a snowcoach into Yellowstone National Park and witness steam breathing bison. Kick back for a day of soaking and spa therapy at one of Montana's natural hot springs resorts. How about snowshoeing into the winter solitude of Glacier National Park or snowmobiling through the Big Sky state's expansive national forests? Ever dream of climbing a frozen waterfall amidst a backdrop of crystallized peaks and snow-heavy valleys? Visitors to Montana will find all of this perched on a backdrop of quaint towns with genuinely hospitable people.

For those whose fondest memories are of the downhill variety, Montana provides a perfect reminder of why you fell in love with skiing in the first place. Tap into the uncomplicated, uncrowded essence of skiing and snowboarding at one of 16 areas across the Big Sky state. Montana offers it all, from big bodacious mountain resorts offering deep snow, massive verticals, and boundless amenities, to down-home, family-run areas offering superb value and lots of soul. No matter what your ski area of choice may be, one constant across the treasure state is the plenitude of billowy cold-smoke powder.

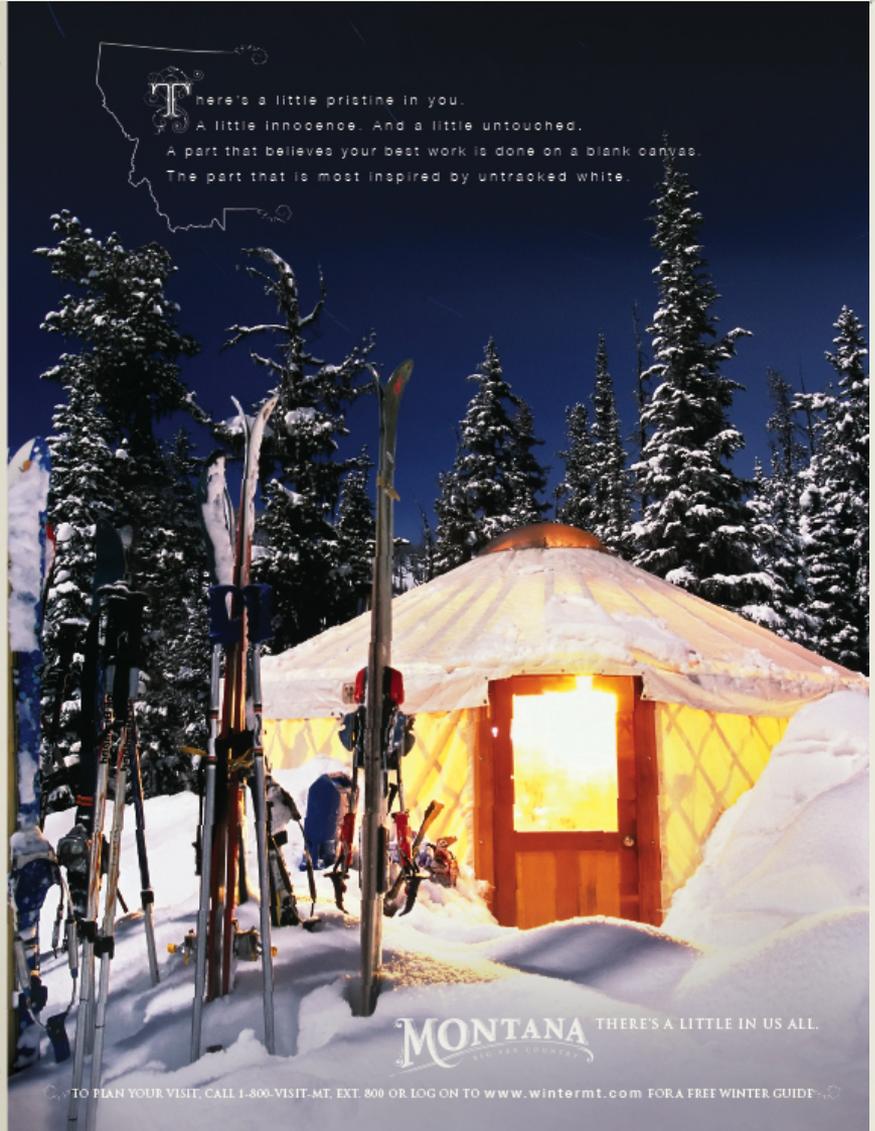


BOZEMAN, MONTANA: WATCH FOR THE BLUE LIGHT

Here's a tip for those fond of powder snow: When visiting the blossoming burg of Bozeman, keep an eye peeled for the telltale blue light mounted atop the historic Baxter Hotel. Locals – and visitors in the know – realize this sapphire beacon can only mean one thing...fresh snow has blanketed the Bridger Bowl Ski Area. And here in Montana, "freshies" come in that extra billowy variety that hangs in the air long after you've arced down the mountain.

BIG SKY/MOONLIGHT INTERCONNECT: BIGGEST SKIING IN THE U.S.

Thanks to the newly offered Lone Peak Interconnect lift ticket option, skiers & snowboarders are free to explore more terrain than any other area in the U.S. at Big Sky Resort and adjacent Moonlight Basin. Together they offer over 5,500 acres of skiing and riding. More terrain means more options for all levels. In fact, there are many die-hard locals who will admit to having barely scratched the surface at this massive, European-style interconnect.



There's a little pristine in you.
 A little innocence. And a little untouched.
 A part that believes your best work is done on a blank canvas.
 The part that is most inspired by untracked white.

MONTANA THERE'S A LITTLE IN US ALL.
 BIG SKY COUNTRY

TO PLAN YOUR VISIT, CALL 1-800-VISIT-MT, EXT. 800 OR LOG ON TO www.wintermt.com FOR A FREE WINTER GUIDE.

Winter Print Co-op

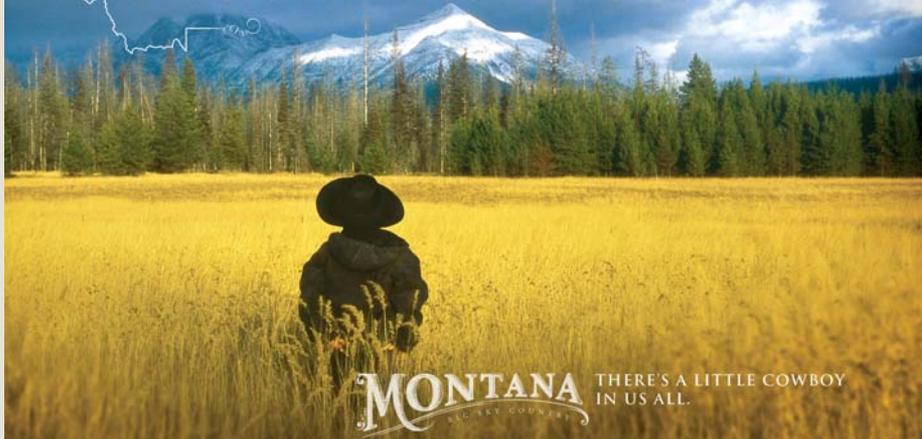
MONTANA

BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce



There's a cowboy in you.
 A part that walks the walk.
 Someone who loves side roads. Or maybe no roads.
 The cowboy in you that loves to say "just passing through."



MONTANA THERE'S A LITTLE COWBOY
 IN US ALL.
BIG SKY COUNTRY

TO PLAN YOUR VISIT, CALL 406-841-2870, FAX 406-841-2871
 OR LOGON TO www.visitmt.com

Glacier National Park, Montana



CUSTER COUNTRY, MONTANA
 Custer Country, in Southeastern Montana, is a changing landscape of badlands, flatlands and highlands; big cities, small towns, open space and endless sky. Experience the art, culture, and history of America's old west. Visit Little Bighorn Battlefield – site of Custer's Last Stand. Visit www.CusterCountry.com and click Free Guide, mention ad #208.



GLACIER NATIONAL PARK, MONTANA
 Visiting Glacier National Park in Montana is an experience that is about more than scenery. The historic lodges fit the landscape perfectly and tours in vintage red buses reveal the Going-to-the-Sun Road like no other could. Fun activities like boat cruises, hiking, river rafting and horseback riding await. Call Glacier Park, Inc. at 406-892-2525 or visit www.glacierparkinc.com to book your client's 2008 Glacier National Park vacation.



BEARTOOTH HARLEY-DAVIDSON/BUELL
 Ride through Montana in the saddle of a Harley-Davidson motorcycle. From the Big Horn Mountains, over Chief Joseph's Highway to the famous Beartooth Pass – experience Montana with the wind in your hair and an unparalleled freedom. Visit www.beartoothrentals.com to rent your Harley for the ride of a lifetime.



Discover America (International Co-op)



Montana Promotion Division · Department of Commerce



There's a little homegrown in you.
A little roll-up-your-sleeves. Loosen-your-tie.
It's the focused part that keeps on track all day.
And the wandering part that strays off the beaten path after hours.
The part that keeps us on our toes.



MONTANA THERE'S A LITTLE IN US ALL.
BIG SKY COUNTRY

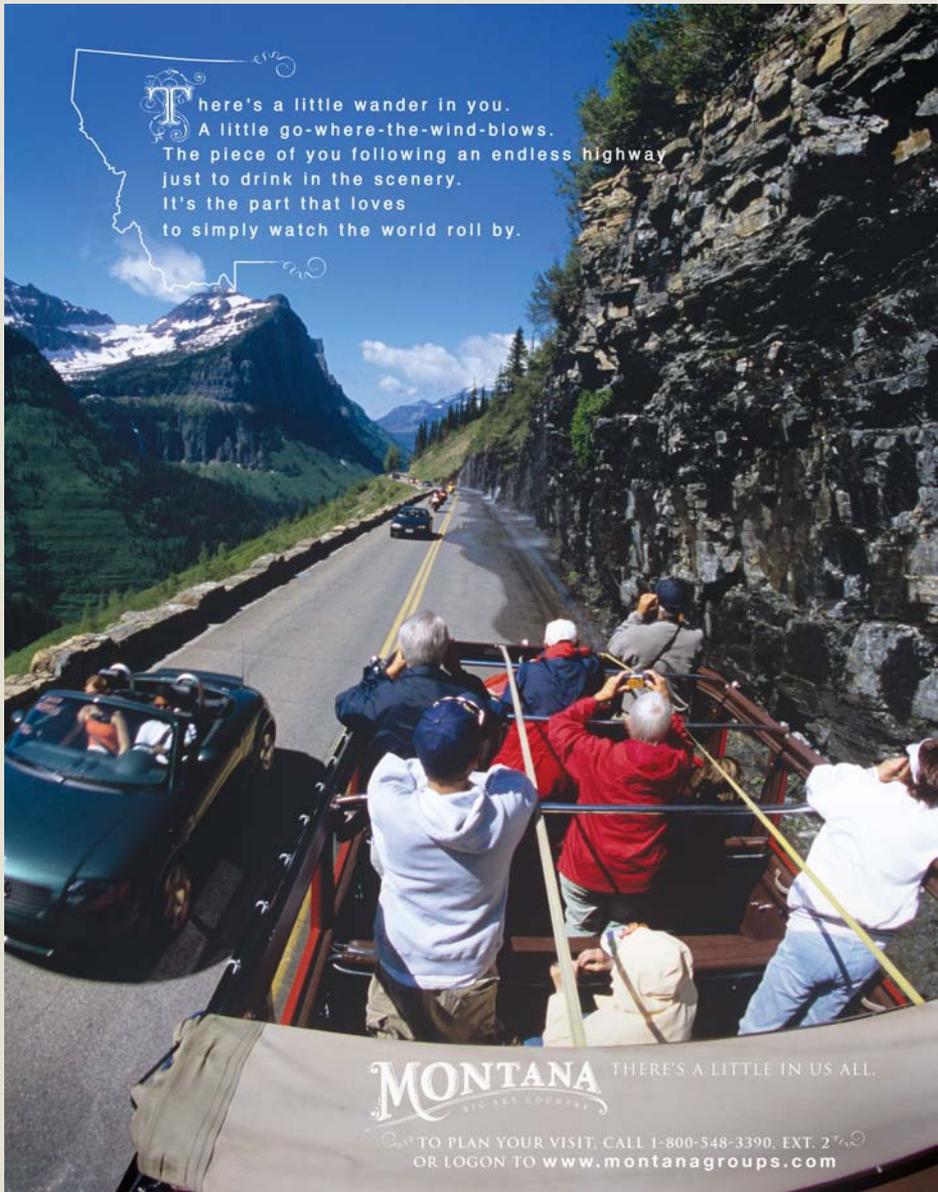
Big Timber, Montana

TO PLAN YOUR VISIT, CALL 1-800-548-3390, EXT. 2
OR LOG ON TO www.montanameetings.com

Meetings & Conventions

MONTANA
BIG SKY COUNTRY

Montana Promotion Division · Department of Commerce



There's a little wander in you.
A little go-where-the-wind-blows.
The piece of you following an endless highway
just to drink in the scenery.
It's the part that loves
to simply watch the world roll by.

MONTANA THERE'S A LITTLE IN US ALL.
BIG SKY COUNTRY

TO PLAN YOUR VISIT, CALL 1-800-548-3390, EXT. 2
OR LOGON TO www.montanagroups.com

Group Tours

MONTANA
BIG SKY COUNTRY

TRAVEL MONTANA
DEPARTMENT OF COMMERCE
301 South Park Avenue • PO Box 200533 • Helena, MT 59620-0533
800-VISITMT (800-847-4868) or 406-841-2670 • TDD: 406-841-2702
visitmt.com ©2006 Travel Montana



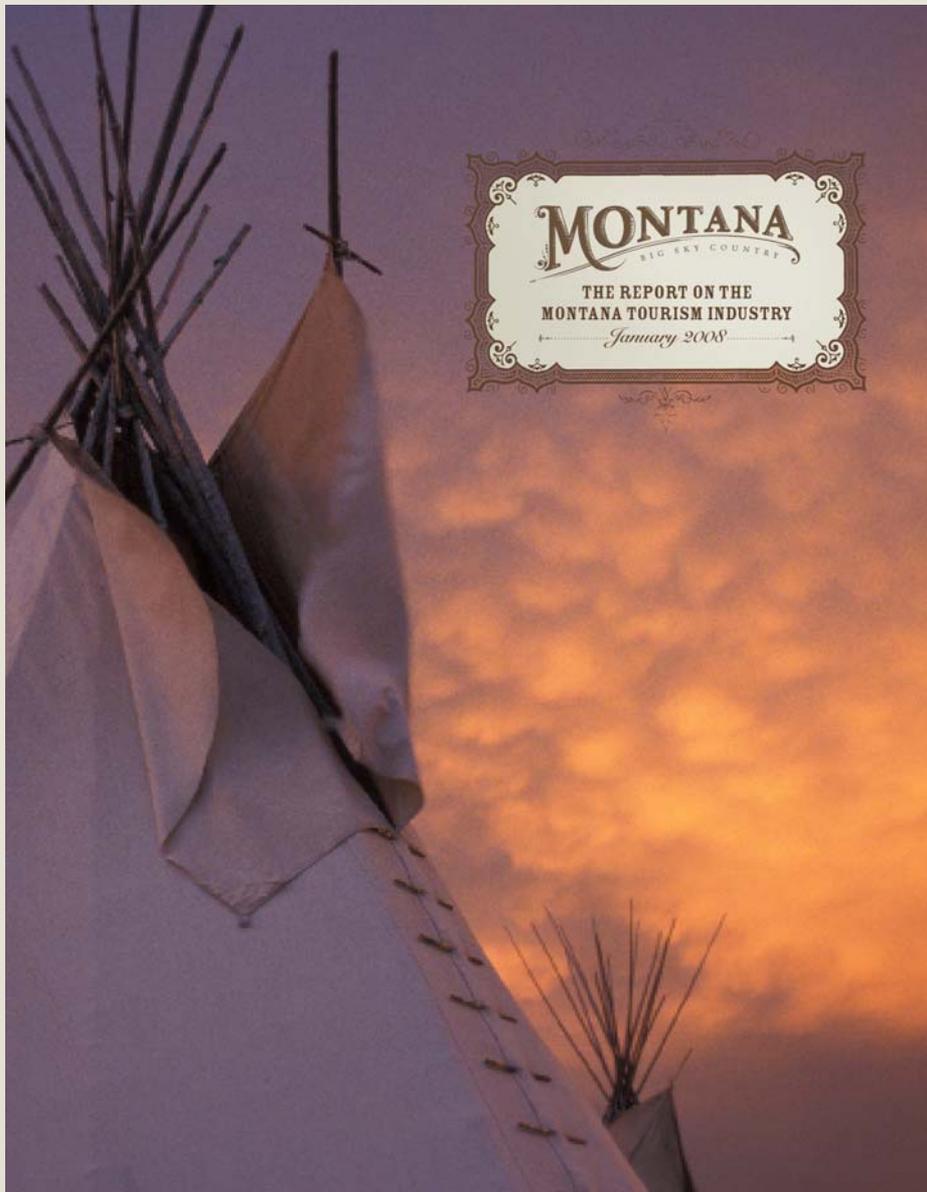
Back

Vacation Planner Cover

Front



Montana Promotion Division · Department of Commerce



Annual Report



Internet





Internet

Search Engines

- Google, Yahoo!, iExplore

Direct E-mail

- YellowstonePark.com
- BudgetTravel.com
- YesMail

Banner Ads

- Travel websites
- Culture/history websites
- Outdoor enthusiast websites
- Active mature websites
- Family travel websites





Internet

Travel

- **Away Network**
 - Includes away.com, gorp.com, gorptravel.com, outside.com
- **TripAdvisor.com**
- **BudgetTravel.com**
- **Fodors.com**
- **TravelandLeisure.com**

Family Travel

- **FamilyTravelForum.com**
- **Away Network**





Internet

Culture/History

- NationalGeographic.com
- Smithsonian.com

Outdoor Enthusiast

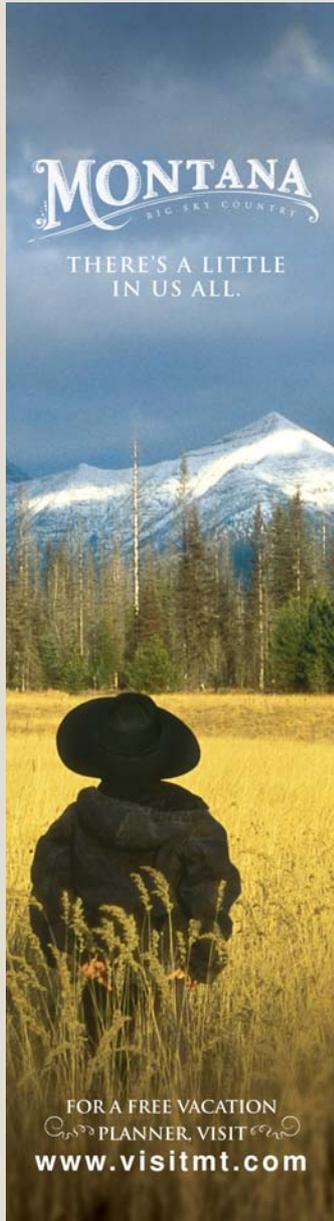
- Wildernet.com
- Away Network
- GordonsGuide.com

Active Mature

- AARP.org



Banner Creative





Internet

Timing

- March 08 through July 08
- Additional internet media buy likely

Search Engines (Pay-per-Click Advertising)

- Cost: \$94,000.00
- Clicks: 87,500
- Cost-per-click: \$1.07

Content Websites (Pay-per-Impression Advertising)

- Cost: \$137,558.40
- Impressions: 6,978,350
- CPM: \$20.23





Internet

Total Budget: \$231,558.40

Co-op contribution: \$29,846.07 (13% of total)





Web Development





Web Development

- Website Enhancements
 - Rich media content development
 - Niche webpage sites
- E-mail Marketing Service





Rich Media Development

- Audio podcasts
 - Register of Historic Places (Butte)
 - Ghost Town Walking Tour (Virginia City and/or Nevada City)
 - Pintler Scenic Driving Route
- Streaming video / vodcasts
 - Glacier National Park
 - “A Day in the Life”
 - Researching repurposing of “Backroads of Montana” footage
- Interactive maps & timelines
- Photo slide shows
- Downloadable PDFs



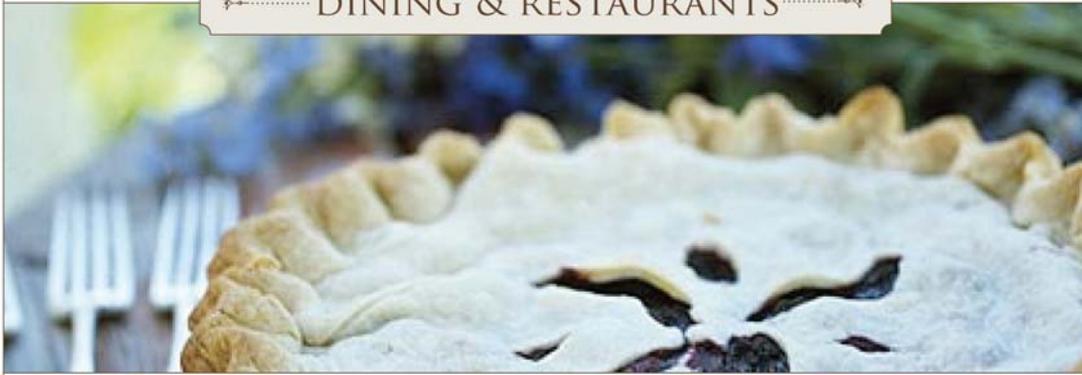


Niche Website Sections

- Dining & Restaurants
- Rodeos
- Farmer's Markets & Ag Tours



DINING & RESTAURANTS



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CHICO HOT SPRINGS

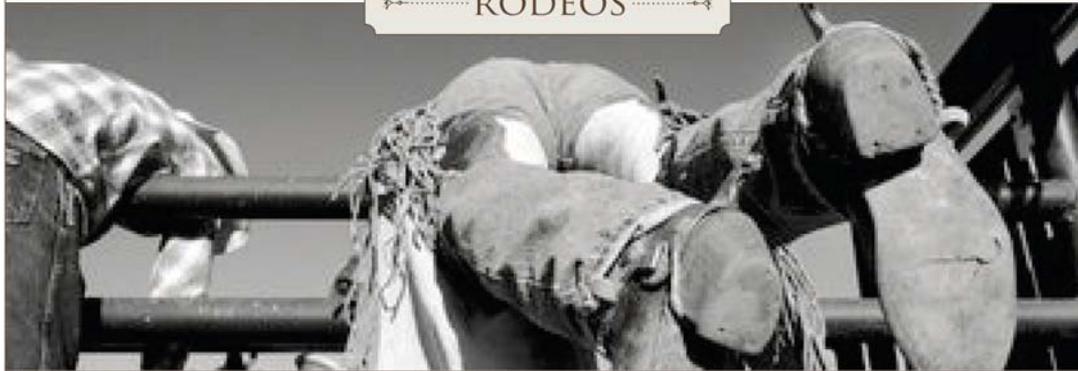
Pray, Montana

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DINING & RESTAURANTS IN MONTANA



RODEOS



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BUCKING HORSE SALE

Miles City, Montana



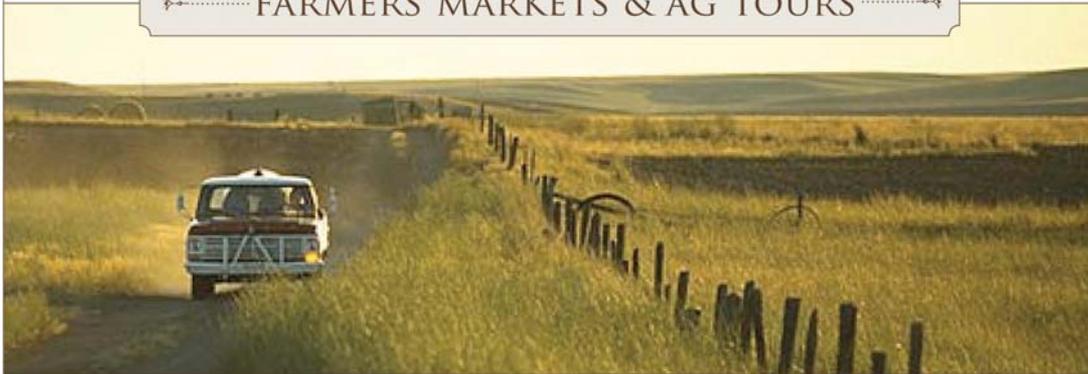
MONTANA RODEOS



DAY IN THE LIFE

IN THE KNOW (AS IT PERTAINS TO RODEO)

FARMERS MARKETS & AG TOURS



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ROCKY CREEK FARMS

Bozeman, Montana

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MONTANA FARMERS MARKETS & AG TOURS





Montana

Cast & Camp Campaign

2008 Key Market Campaign



Montana Cast & Camp Campaign

- Nationwide promotion with Orvis
- In-store presence in 40 company-owned stores
- Media campaigns in 3 key markets (Chicago, Atlanta, & Dallas)
- Timing: May-July 2008
- Budget: \$1,500,000
- The Hook: win a luxury camp & fish vacation to Montana.



ENTER TO WIN A *free* TRIP TO MONTANA.

The trip includes a 5 day/4 night all expense paid fly fishing trip for you and 3 guests to North Fork Crossing Lodge. You'll be set up for success before you hit the rivers with your own fly fishing gear from Orvis®. Then, experience 3 days of guided fly fishing with PRO Outfitters on some of the best and least-crowded trout water in Montana. After each day on the serene water, enjoy a delicious gourmet meal and recount your fishing stories with friends around a campfire.

We won't mind if you exaggerate a little.

*TRIP INCLUDES AIRFARE, GROUND TRANSPORTATION, LODGING, MEALS AND THREE DAYS OF GUIDED FLY FISHING.

MONTANA
BIG SKY COUNTRY
VISITMT.COM

ORVIS
ORVIS.COM



Montana Cast & Camp National Exposure

- Posters & entry boxes in-store promoting “Montana Cast & Camp Luxury Vacation Sweepstakes”
 - Tie-in with Orvis summer travel sale promo
 - Generate leads for future marketing
 - Generate interest & awareness
- Bag stuffers in customer bags
- Direct email blasts to Orvis consumer email database
- Direct email blasts to Travel Montana consumer email database
- Web banners on www.orvis.com
- Blow-in cards in targeted Orvis catalogs
- Sweepstakes featured in 8-page full-color newspaper insert distributed in Chicago, Seattle, Minneapolis-St. Paul, and other markets in MN, ND & Canada





Montana Cast & Camp

Key Market Media Campaign

- More concentrated efforts in Chicago, Atlanta & Dallas:
 - Radio Campaign
 - Print Campaign
 - In-store “Montana Experience” events w/ Montana food, fly-tying demos & musicians
 - Out-of-Home Media
 - Dry cleaning bags
 - Trains (Chicago only)
 - Viral Marketing/Street Teams
- Call-to-action: website only (no 800#; limited RS)



Montana Cast & Camp Website

www.visitmt.com/orvis

- Live May 1st
- After sweepstakes ends (June 29), website will redirect to www.visitmt.com/fishing



IT'S THE KIND OF CAMPING TRIP WHERE *roughing it* MEANS YOU'VE RUN INTO A STUBBORN CORK.

It's the kind of camping trip where there's a tent. With a featherbed. Gourmet meals. And a local to take you to some of our more private waters. The kind of camping trip where all the details are taken care of. Maybe even the bill.



THE PRIZE | OFFICIAL RULES | ENTER CONTEST

PLAN YOUR TRIP TO MONTANA | CONTACT US

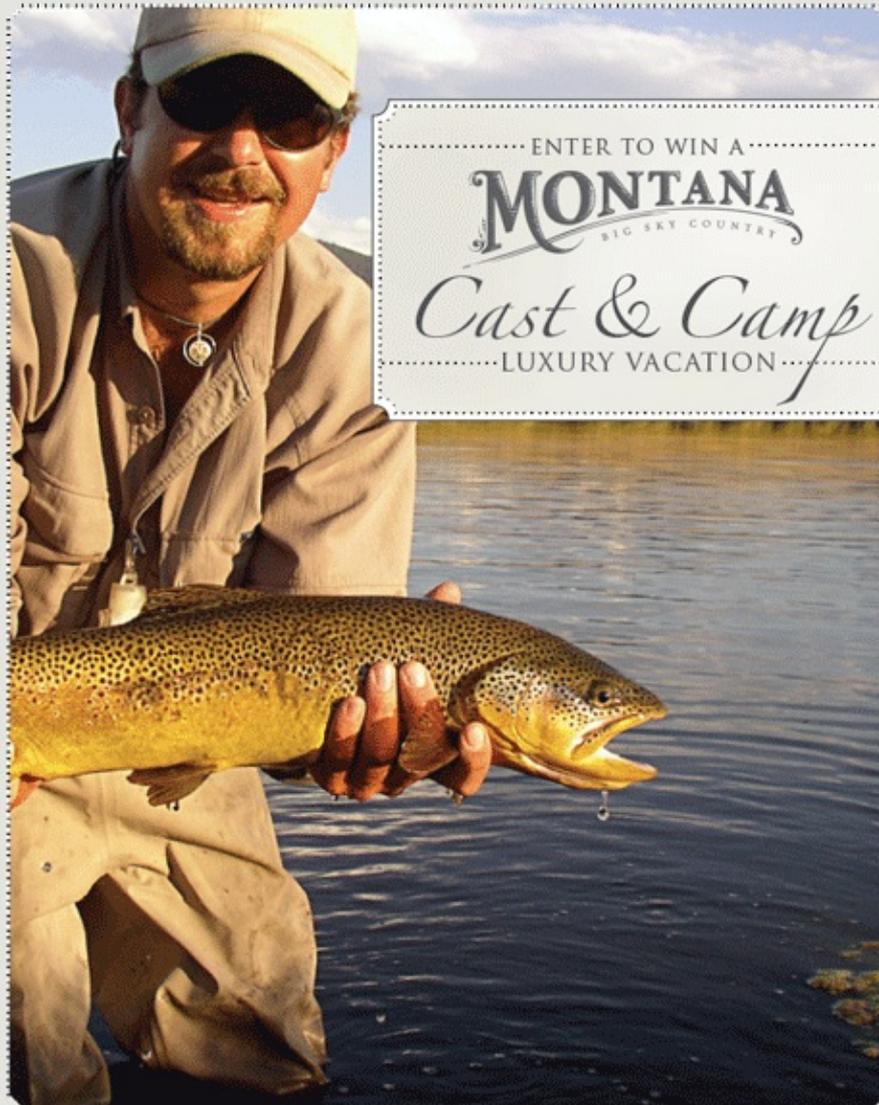
VISIT A MONTANA ORVIS® ROADSHOW

BROUGHT TO YOU BY:

MONTANA
BIG SKY COUNTRY
VISITMT.COM

ORVIS
ORVIS.COM

Montana Cast & Camp Website



THE PRIZE

The trip includes a 5 day/4 night all expense paid fly fishing trip for you and 3 guests to North Fork Crossing Lodge. You'll be set up for success before you hit the rivers with your own fly fishing gear from Orvis®.

Then, experience 3 days of guided fly fishing with PRO Outfitters on some of the best and least-crowded trout water in Montana. After each day on the serene water, enjoy a delicious gourmet meal and recount your fishing stories with friends around a campfire. We won't mind if you exaggerate a little.

***TRIP INCLUDES AIRFARE, GROUND TRANSPORTATION, LODGING, MEALS AND THREE DAYS OF GUIDED FLY FISHING.**



THE PRIZE | OFFICIAL RULES | ENTER CONTEST

PLAN YOUR TRIP TO MONTANA | CONTACT US

VISIT A MONTANA ORVIS® ROADSHOW

BROUGHT TO YOU BY:

MONTANA
BIG SKY COUNTRY
VISITMT.COM

ORVIS
ORVIS.COM

Montana Cast & Camp Website



CONTACT US

Travel Montana/Montana Promotion Division,
Department of Commerce, State of Montana

LOCATION

301 South Park Ave. Helena MT 59601

MAILING ADDRESS

Montana Promotion Division
PO Box 200533 Helena MT 59620-0501

PHONE/FAX

Phone: 406.841.2870 Fax: 406.841.2871

EMAIL

mt-webmaster@visitmt.com

THE PRIZE | OFFICIAL RULES | ENTER CONTEST

PLAN YOUR TRIP TO MONTANA | CONTACT US

VISIT A MONTANA ORVIS® ROADSHOW

BROUGHT TO YOU BY:

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ORVIS.COM

Montana Cast & Camp Dry Cleaning Bags



whiter WHITES
& COLORFAST *blues.*

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SEE
FUR COATS
ON THEIR
original
OWNERS.

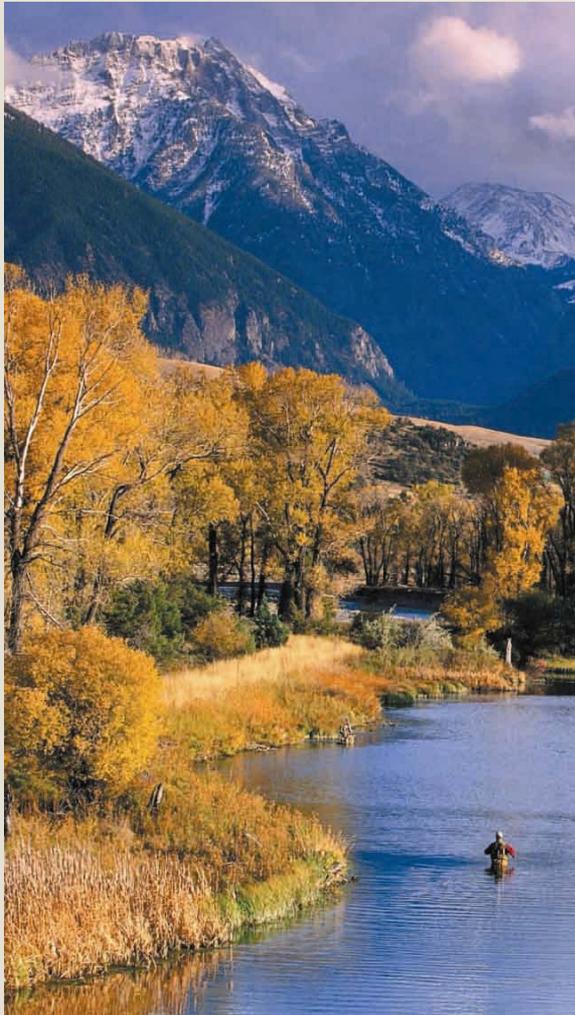
MONTANA
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MAKE YOUR
CLOTHES *earn*
THEIR NEXT
DRY CLEANING.

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THERE'S A LITTLE IN US ALL.

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BIG SKY COUNTRY

Montana Cast & Camp Train Wrap (Chicago)



3 Parks Campaign





3 Parks Co-op

Campaign to promote region's three national parks:

- Glacier NP
- Grand Teton NP
- Yellowstone NP

Contributing partners include:

- Travel Montana
- Wyoming Travel & Tourism
- Grand Teton Lodging Co.
 - lodging concessionaire for GTNP
- Xanterra
 - lodging concessionaire for YNP
- Glacier Park, Inc.
 - lodging concessionaire for GNP





3 Parks

continuing 2007 Strategy

Target Market

- Adults traveling without children, ages 45-64
 - formerly families, targeting parents ages 35-54

Campaign Timing

- Building travel in the fall shoulder season
 - formerly focused on summer trips
- Campaign advertising will run June-August
 - formerly ran March-May





3 Parks

- **New Creative**
 - Magazine
 - Fulfillment piece
 - Web banners & 3parks.com website
- **Co-op Budget = \$190,000**
 - Magazine media buy & production: \$155,000
 - Fulfillment piece/production: \$10,000
 - Web buy & development: approx. \$25,000





International Marketing





International Marketing

- Over 2% of Montana's Visitors are from Overseas.
- Weak U.S. dollar will influence more travel to U.S.
- Canadian visitation particularly strong.





International Marketing

- Montana markets to Europe with the states of Idaho, South Dakota and Wyoming with a company called Rocky Mountain International (RMI) based in Cheyenne, WY.
- RMI coordinates the marketing activities and has established offices in our key markets of Germany, the United Kingdom, Belgium, France, the Netherlands and Italy.
 - New markets include Scandinavia and Australia.
- In the Pacific Rim, Travel Montana works with the Dept. of Commerce Trade Offices in Taipei, Taiwan and Kumamoto, Japan on tourism marketing related projects.





Group Travel





Group Travel

A full loaded motorcoach contributes \$5,000 to \$7,500 per day to the local economy.





Group Travel

The average daily expenditure per person traveling with a group is \$192 as opposed to an independent traveler who spends \$187.
(NTA packaged travel study 2000)

- The program conducts FAM tours for group tour operators.
- Staff attend three national conventions to promote Montana as a destination.
 - NTA, National Tour Association
 - ABA, American Bus Association
 - BankTravel
- Advertise in Trade Publications.
- Produce *Group Tour Planning Guide*.
- www.montanagroups.com
- Provide itinerary counseling to operators.





Meetings and Conventions





Meetings & Conventions

- Trade Show Assistance Program to Regions and CVBs.
- Print co-op advertising in:
 - Small Market Meetings
 - Association News
 - Smart Meetings
- Electronic co-op advertising in:
 - Association News
 - Meetings Focus
 - Smart Meetings
- Attend Destination Marketing Association International Annual Convention (DMAI)
- www.montanameetings.com



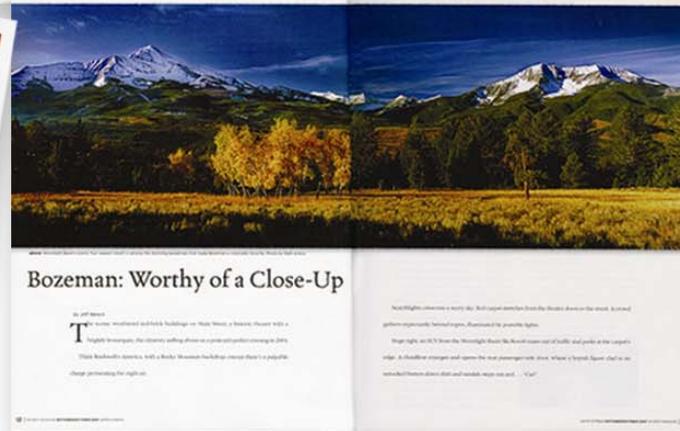
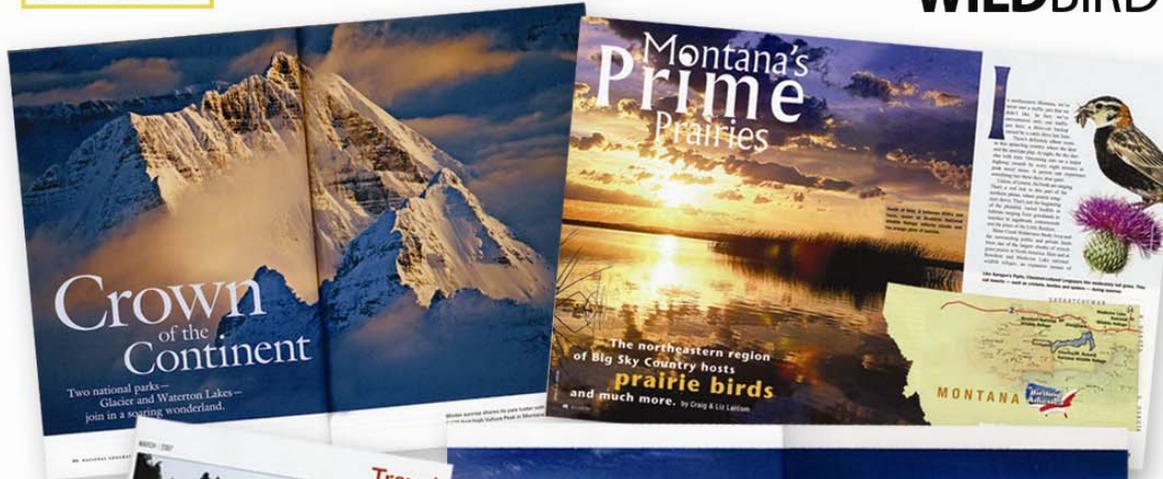


Publicity



NATIONAL GEOGRAPHIC

WILDBIRD



ForbesLife

SkyWest

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Montana Promotion Division · Department of Commerce



Publicity efforts

- Media database/Press list
 - 1450 journalists
- Media Calendar
- Press Trips
- Press Room
 - www.pressroom.visitmt.com
- Email Blasts
- Trade Shows
 - SATW, NASJA, PowWow





Publicity efforts

- **Publicity Value**
 - \$18,000,000 in publicity values has been calculated to-date* in FY08.
 - Approximately 2/3 of this is a result of Travel Montana's publicity program.

*(Apr 08)





Travel Montana Publications



Travel Montana Publications



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Montana Promotion Division · Department of Commerce



Publications

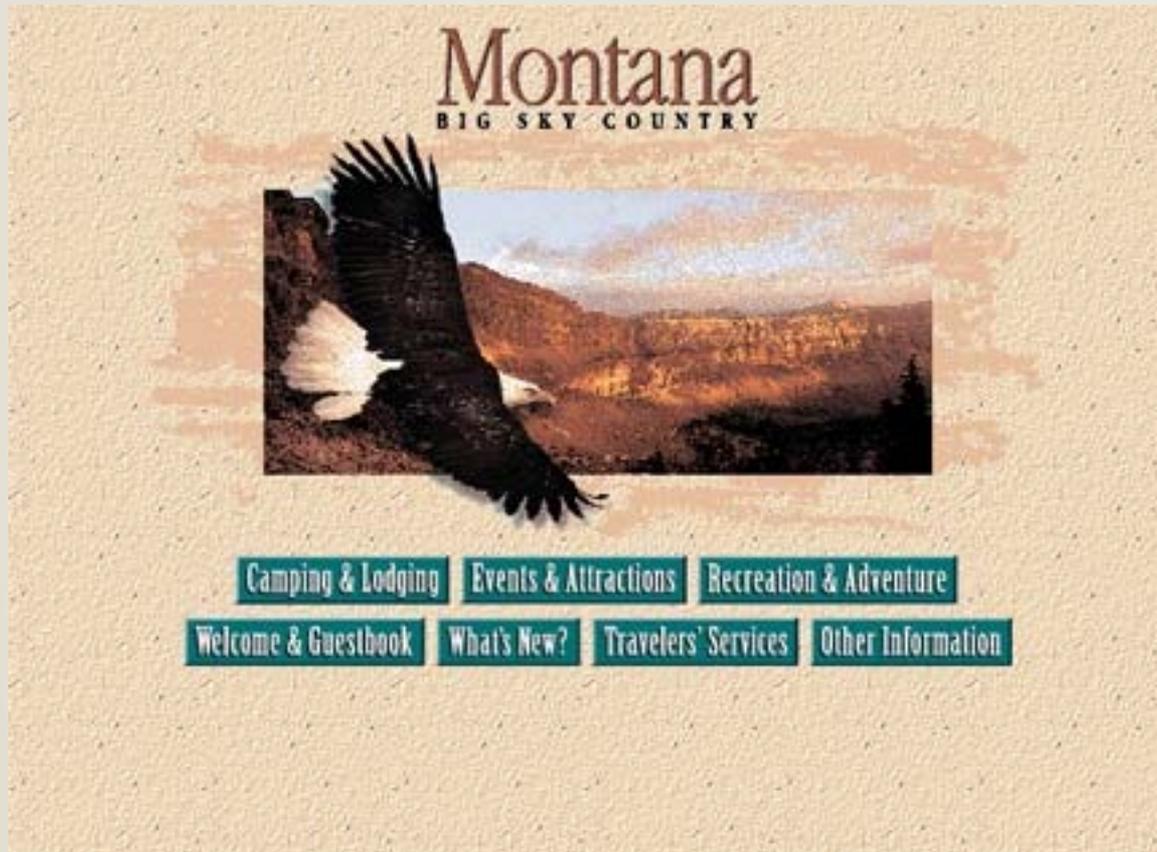
- Produces 1.6 million pieces of literature per year.
 - Guides, Planners, Brochures, Maps
- Offers Montana businesses affordable advertising opportunities to reach the travel market.





Electronic Marketing





First Travel Montana Website 1994





WELCOME

Montana is a rare and special place. Our Big Sky, open land, majestic mountains and friendly people 'combine to make Montana the "Treasure State". I invite you to explore Big Sky country and discover all the treasures we have to offer.

See you soon,
Governor Brian Schweitzer

BIG SKY COUNTRY



SITE FEATURES

Plan A Montana Vacation

Accommodations and camping, attractions, events, and transportation information, all accessible from one place on [visitmt.com](#), to better help you [plan your Montana Getaway](#).

Travel Montana Press Room

A resource for journalists and media featuring [story ideas](#), [photo galleries](#) and [Montana information](#).

Email This Page To A Friend

Look for the [Email This Page To A Friend](#) button on all the pages in this site. It allows you to show the page you are viewing to interested friends or family.

Quick Search

Montana's Cities & Towns

Your source for detailed data, maps, and local information for all of Montana's communities. [Cities & Town Info](#)

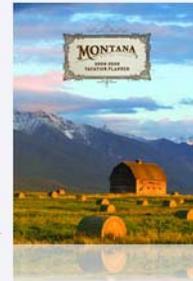
Tourism Regions

The state's six tourism regions invite you to find out more about the distinct scenery, attractions and experiences

ADDITIONAL INFORMATION

Order A Free Vacation Planner

The Montana Vacation Planner is packed with information and tips; just the sort of thing you want to have along on your trip to Montana. So what are you waiting for? [Order a free Montana Travel Kit](#) including the 2008-2009 [Vacation Planner](#) and [Calendar of Events](#).



International Visitors

Our partner websites can provide information for international visitors in several different languages. [International Traveler Information](#).

TOP STORIES

Crown of the Continent

Travelers seeking unspoiled natural places, authentic cultural experiences and distinctive communities have a valuable resource in the [Crown of the Continent Geotourism MapGuide](#) produced by the [National Geographic Society](#) and residents of [Montana](#), [Alberta](#) and [British Columbia](#). [Come Enjoy the Crown!](#)

Montana's Birding Trails

Grab your binoculars and head to great bird watching. [Check Out The Trails](#).

National Folk Festival

One of the country's largest and most prestigious celebrations of the arts, the National Folk Festival, is coming to Butte for a three-year tenure beginning in July 2008. [Plan to attend](#).



Montana Through The Photographer's Eye

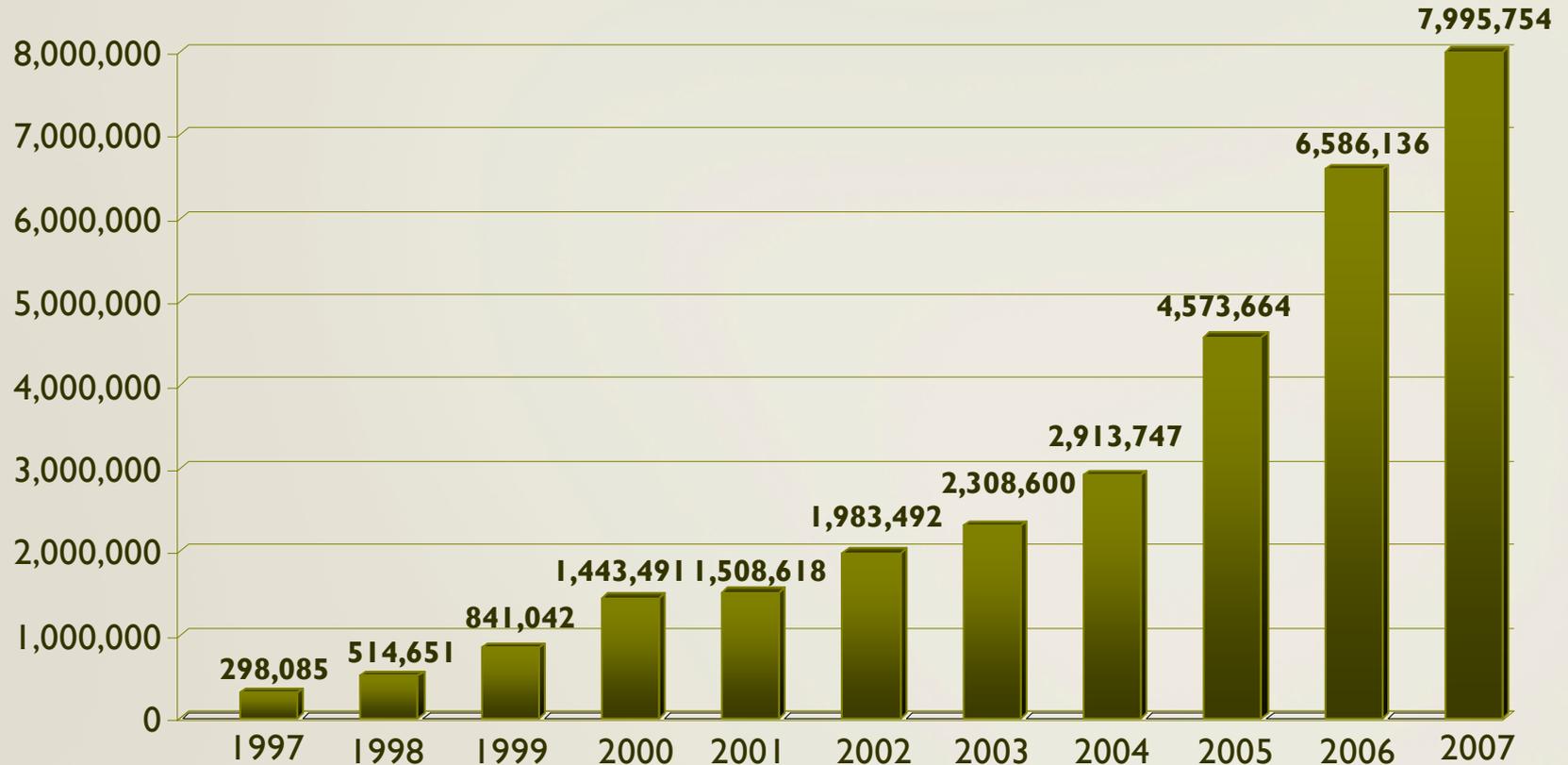


Helena, MT resident Jason Savage is a freelance and commercial photographer, specializing in outdoor, travel and editorial photography. [Enjoy some of his wonderful work](#).

Travel Montana Website 2008

VISITMT.COM

Growth from 1997-2007



Travel Montana Websites (30)

Sponsored

- visitmt.com
- lewisandclark.state.mt.us
- wintermt.com/skimt.com
- montanakids.com
- montanameetings.com
- montanafilm.com
- indiannations.visitmt.com
- travelmontana.org (Intranet)
- montanagroups.com
- wildlife.visitmt.com
- montanainfo.org
- Co-op Sites: (sledtherockies.org, fourparks.com, nwlewisclark.com)

Hosted

- billingscvb.visitmt.com
- missoulameetings.visitmt.com
- yellowstone.visitmt.com
- russell.visitmt.com
- circle.visitmt.com
- bozemancvb.visitmt.com
- missouririver.visitmt.com
- glacier.visitmt.com
- goldwest.visitmt.com
- custer.visitmt.com
- greatfallscvb.visitmt.com
- helenacvb.visitmt.com
- westyellowstone.visitmt.com
- bigsky.visitmt.com
- mtdinotrail.org
- nemontanabirdingtrail.org





Customer Contact Center





Customer Contact Center

- Contracted with MARS Stout in Missoula
- Respond to over 200,000 requests for information per year
- Ability to respond to requests via phone, email, database letters, web chat
- VISITS software is integrated with our website database





Travel Montana's Tourism Development & Education Program





Travel Montana's Tourism Development & Education Program

- Grants
- Technical Assistance
- Partnerships
- Education





Tourism Development & Education Projects

- Cultural & Heritage Tourism Projects:
 - MT Dinosaur Trail
 - Hands of Harvest: The Craft & Heritage Trails of NC MT
 - Of Sage & Stone Heritage Trails of SW MT
- Montana Tribal Tourism Alliance Projects and Operations Support
- Montana Governor's Conference on Tourism & Recreation (March 30-31, 2009, Helena)
- Montana Superhost Program





Travel Montana's Tourism-related Grants

- Tourism Infrastructure Investment Program (TIIP) -- \$300,000 Grant Pool (2008)
- Special Event Grant Program (SEGP) -- \$61,500 Grant Pool (2008)



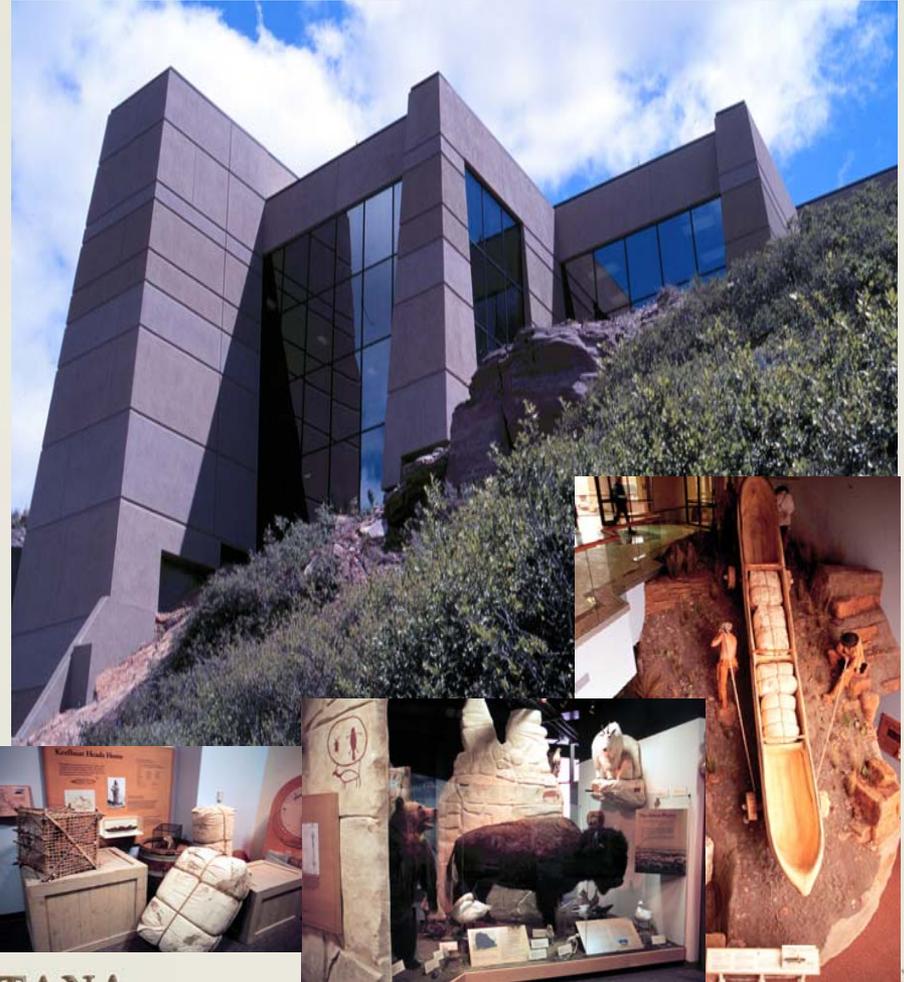
Tourism Infrastructure Investment Program (TIIP) Results 1995-2007

- 63 “Brick & Mortar” Projects
- 43 Montana Communities
- \$2.75 million tourism “bed tax” invested
- > \$33 million in tourism projects assisted



TIIP Elements

- “Brick & Mortar” Project
- IRS Recognized Non-Profit Sponsor
- Minimum Grant: \$20,000
- Hard Match: \$1 match/\$2 Grant
- Minimum Project: \$30,000
- Maximum Grant: Grant Pool Amount



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TIIP: The Basic Questions

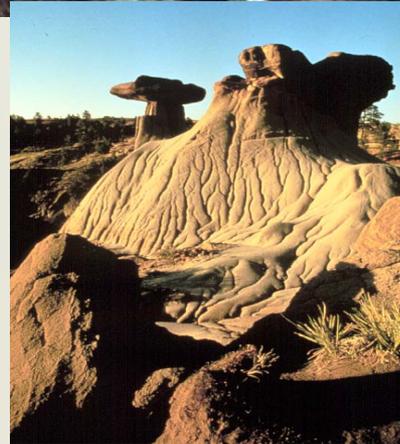
- Strengthen MT as a Visitor Attraction?
- Keep Current Visitors Longer?
- Help Visitors Spend More \$?
- Without TIIP \$, Will Historical/Cultural Treasure Be Lost?



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TIIP: Priorities

- High Priority:
 - Historical & Cultural Preservation & Interpretation
 - Build on Community/Region's Unique Strength
 - Completing Projects
- Low Priority:
 - Start Up \$
 - VICs and stand-alone restrooms



Wahkpa Chui'gn Bison Kill
HI County CTEP Project



Special Event Grant Program 2002-2008



- Community economic development through new annual, on-going events



- Cultural and heritage events, sporting events and attendance events

- To Date: \$412,500 for 59 events



SEGP Eligibility

- Non-profit sponsor, city, county, tribe (federal & state agency NOT eligible)



- New annual event or less than 3 years old

- Event focused on attracting visitors from outside a 100-mile radius



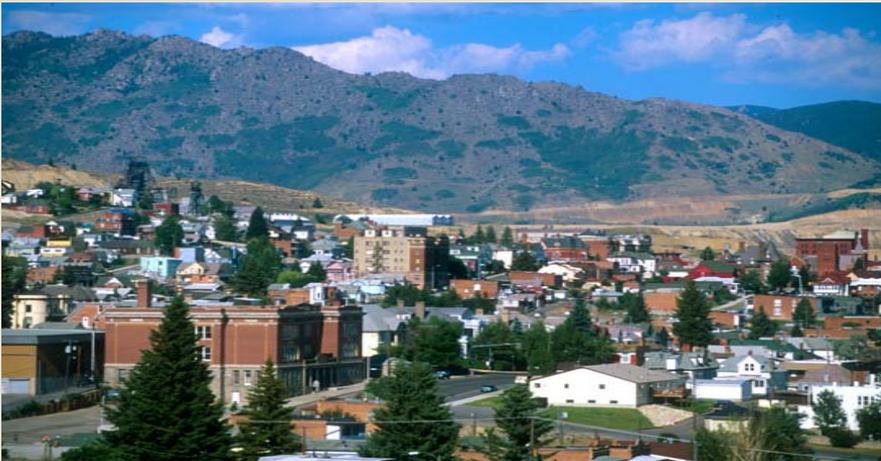
- Match Funds: at least 50% “hard” match, match ratios vary depending on economic status of county



SEGP Uses

• Eligible Uses:

- *Marketing
- *Equipment Rental
- *Insurance
- *Performer Fees
- *Event Security
- *Mailings
- *Promotional Materials



• Ineligible Uses:

- *Construction
- *Prize Money
- *Reunions
- *County Fairs
- *Conventions
- *Payroll
- *Alcohol
- *Cash
- Subsidies



Travel Montana's Tourism Technical Assistance





Technical Assistance

- Tourism Research: Travel Montana, ITRR-UM, other sources
- Tourism-related Technical & Financial Resources: state, federal, private
- No & Low Cost Marketing Services: Travel Montana, AAA Montana, Tourism Regions, CVBs



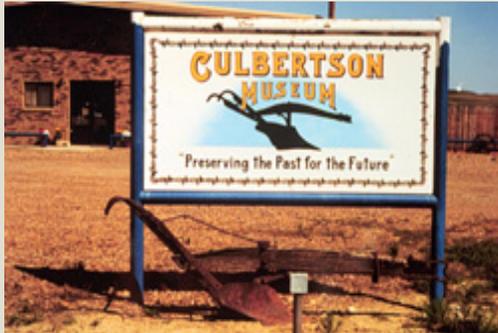


Montana Visitor Information Systems (VIS)



Visitor Information Centers (VICs)

9 Gateway Communities



- * Dillon
 - * Broadus
 - * Wibaux
 - * St Regis
 - * Shelby
 - * West Yellowstone
- * Culbertson
 - * Hardin
 - * Lolo Pass



*Made in Montana Product
Display Cases*





Montana VIC Display Case Program

Partnership with Made / Grown in Montana programs

- Marketing opportunity for registered manufacturers, producers and entrepreneurs
- Registered products and manufacturers are able to showcase goods to over 200,000 nonresident travelers per season (May thru Sept)
- Partnership strengthens Montana's economy by promoting locally grown and made products





Montana VIC Fast Facts

Of the nonresident visitors who visited Montana during the 2nd and 3rd quarters of 2006 (April through June and July through September), nearly 30% of them (2.2 million) used visitor information center staff as a source of information “some” or “a lot.”

- These visitors spent an average of \$178.65 per group per day (\$150.96 for All Visitors)
- These visitors spent an average of 6.26 nights in Montana (4.79 for All Visitors)
- This resulted in an average per group expenditure of \$1,118.35 per trip (\$723.10 for All Visitors)
- This translates into approximately \$973 million spent by these visitors during quarters 2 and 3.





Brochure Distribution

Travel Montana Travel Planner distributed at 555 sites statewide.





Montana Film Office



Montana Promotion Division · Department of Commerce



Montana Film Office – General Information

- Created in 1974 as central information source for on-location filmmakers
- Part of Montana Promotion Division of the Montana Dept. of Commerce
- Funded entirely by the 4% lodging facility use tax
- Ensures that Montana is “film friendly”





Montana Film Office – What We Do

- Primary role is to bring Productions to Montana for the Economic Benefit of the State
- Produces the Montana Production Guide with Listings of 275 Montana Crew Members and over 700 Montana Businesses
- Maintains montanafilm.com as a Marketing and Fulfillment tool
- Administers Montana’s film production incentive, the “Big Sky on the Big Screen Act”
- Provide service to Production Companies that are interested in filming in Montana
 - Find locations that fit scripts
 - Act as liaison throughout production and cut red tape
 - Host Scouting trips for producers





Direct Economic Benefits of Film Production – Why We Do It

- Money spent on wages, products, services
- Brings in “new” money that would otherwise be spent in Canada or another state
- Total economic impact is 1.5 times the direct expenditures by the production company
- Productions help create & retain jobs for Montana workers and graduates of Montana’s University’s film programs
- Comparable to a medium size business generating revenue in months, not years. With no need for additional infrastructure such as schools and public services
- 7.0 Million Dollars of Direct Economic Impact in 2006





Partial List of Movies Filmed in Montana

- **Glacier Country**

1. Pretty Ugly People (2007)
2. The Chronicles of Narnia: The Lion, The Witch and The Wardrobe (2005)
3. Devil's Pond (2003)
4. Hidalgo (2004)
5. Frozen in Fear (2001)
6. Big Eden (2000)
7. What Dreams May Come (1998)
8. Under Siege 2: Dark Territory (1995)
9. Beethoven's 2nd (1993)
10. Forrest Gump (1994)
11. The River Wild (1994)
12. Always (1989)
13. Disorganized Crime (1989)
14. Continental Divide (1981)
15. The Shining (1980)
16. Damnation Alley (1977)



17. Winds of Autumn (1976)
18. Winterhawk (1975)
19. All the Young Men (1960)
20. Timberjack (1955)
21. Dangerous Mission (1954)
22. Cattle Queen of Montana (1954)
23. Powder River (1953)
24. Red Skies of Montana (1952)
25. The Big Trail (1931)





Partial List of Movies Filmed in Montana

- **Gold West Country**

26. Love Comes to the Executioner (2006)
27. Don't Come Knocking (2005)
28. The Patriot (1997)
29. Return to Lonesome Dove (1993)
30. The Last Ride (1994)
31. Diggstown (1992)
32. Thousand Pieces of Gold (1991)
33. Amazing Grace and Chuck (1987)
34. Runaway Train (1985)
35. Fast-Walking (1982)
36. Heaven's Gate (1980)
37. Greyeagle (1977)
38. Evel Knievel (1971)
39. Little Big Man (1970)

- **Russell Country**

40. Three Priests (2007)
41. The Slaughter Rule (2000)
42. Broken Arrow (1996)
43. Holy Matrimony (1994)
44. War Party (1988)
45. The Untouchables (1987)
46. The Stone Boy (1984)
47. Heartland (1979)
48. Telefon (1977)

- **Missouri River Country**

49. Northfork (2003)
50. Firefox (1982)

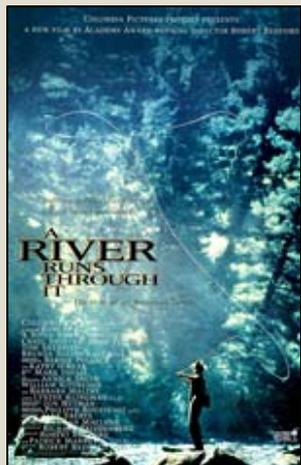




Partial List of Movies Filmed in Montana

- **Yellowstone Country**

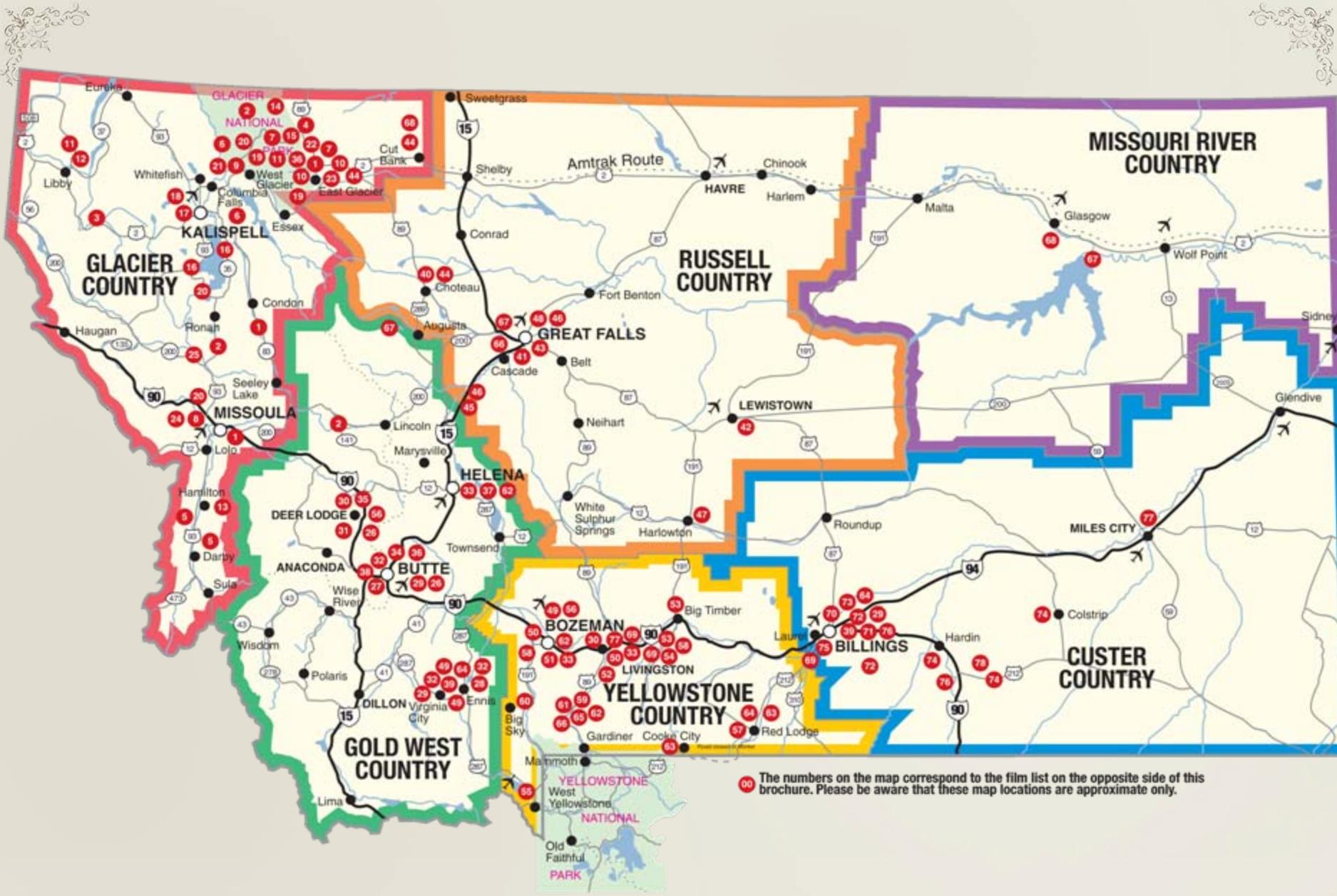
51. Taking Chance (2008)
52. A Plumm Summer (2007)
53. Wolfsummer (2003)
54. The Hi-Line (1999)
55. The Horse Whisperer (1998)
56. Everything That Rises (1998)
57. Iron Will (1994)
58. The Last Ride (1994)
59. The Ballad of Little Jo (1993)
60. A River Runs Through It (1992)
61. Keep the Change (1992)
62. True Colors (1991)
63. Cold Feet (1989)
64. Amazing Grace and Chuck (1987)
65. Triumphs of a Man Called Horse (1982)
66. Missouri Breaks (1976)
67. Rancho Deluxe (1975).
68. Thunderbolt and Lightfoot (1974)



- **Custer Country**

69. A Fork in the Road (2008).
70. Josh and S.A.M. (1992)
71. Far and Away (1992)
72. Son of the Morning Star (1991)
73. Bright Angel (1991)
74. Pow Wow Highway (1989)
75. Stacking (1987)
76. Warpath (1951)
77. Danger Lights (1930)
78. The Devil Horse (1926)





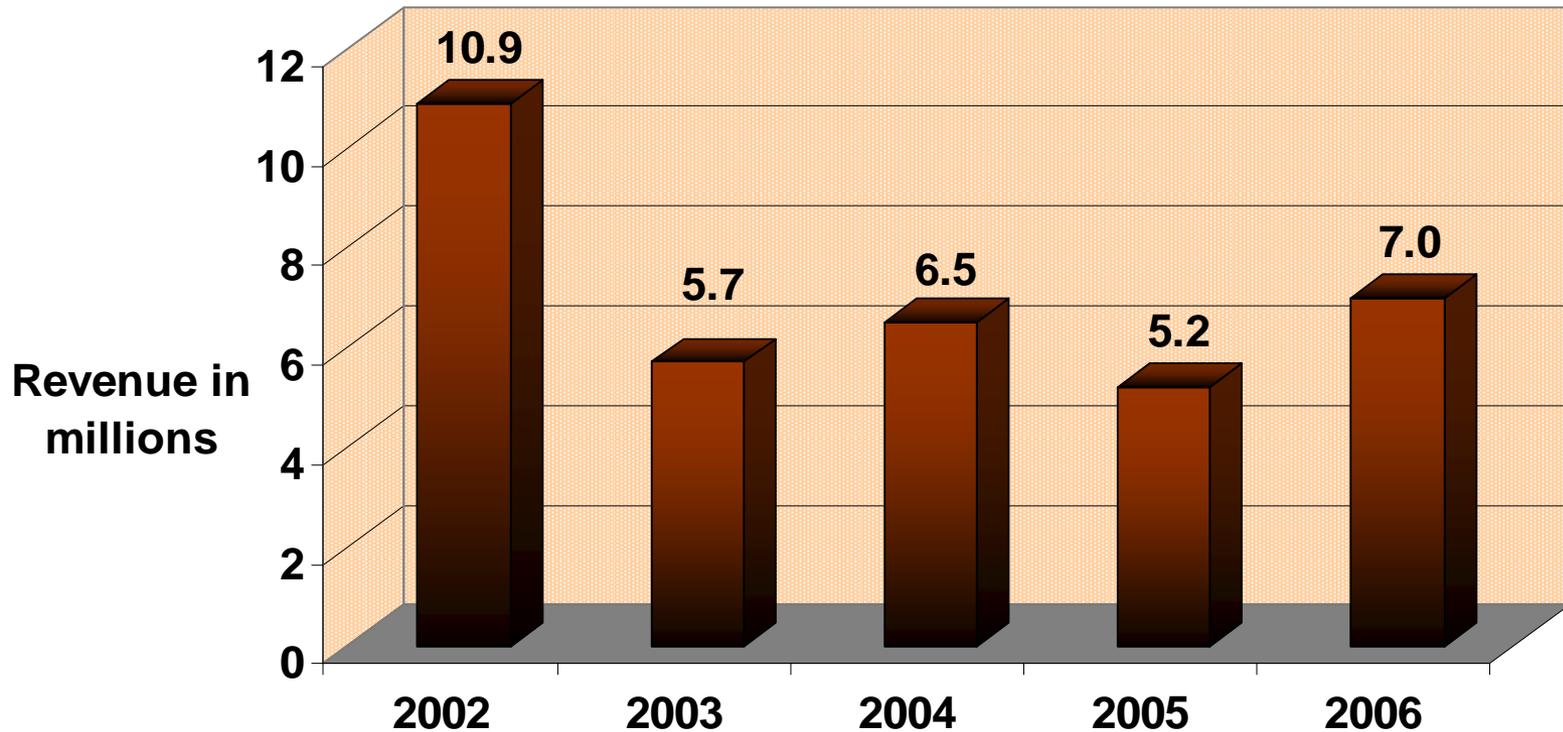
00 The numbers on the map correspond to the film list on the opposite side of this brochure. Please be aware that these map locations are approximate only.

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2002-2006 Revenue Chart

Montana Revenue From Filming *





How We Promote Filming in Montana

- The Big Sky on the Big Screen Act (incentive)
- Advertising
- Trade Shows
- Film Festivals (Sundance, AFI Fest, Hatch, etc.)
- www.montanafilm.com
- The Montana Production Guide
- Promotional Items





The Big Sky on the Big Screen

- **14%**

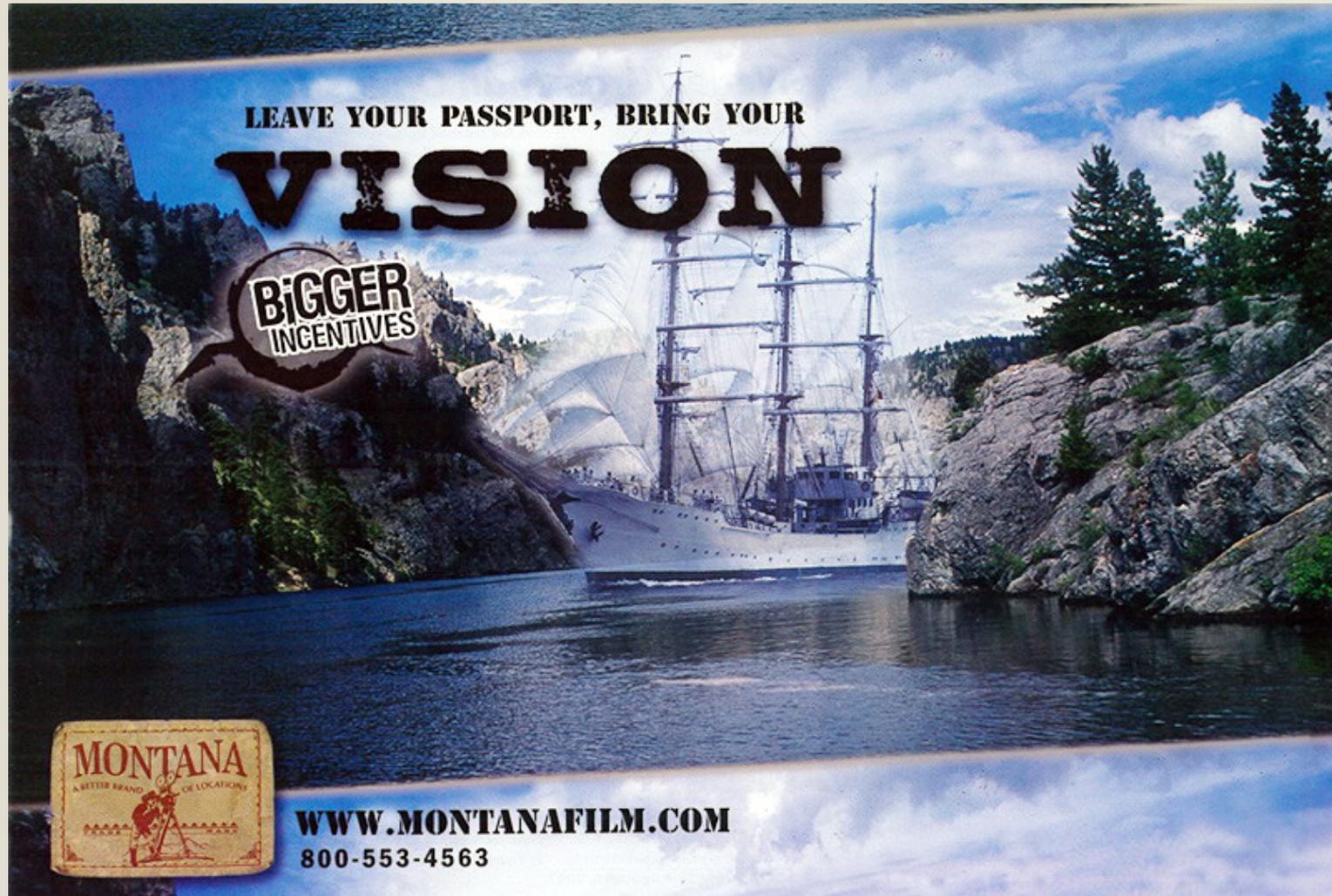
Fourteen percent refundable tax credit based on company expenditures on Montana labor and actors hired by the production company

- **9%**

Nine Percent refundable tax credit based upon qualified production expenditures purchased in Montana - includes hotel/motel expenditures



Film Office Ad Campaign



LEAVE YOUR PASSPORT, BRING YOUR
VISION

BIGGER INCENTIVES

MONTANA
A BETTER BRAND OF LOCATIONS

WWW.MONTANAFILM.COM
800-553-4563

MONTANA
BIG SKY COUNTRY

Film Office Ad Campaign

LEAVE YOUR PASSPORT, BRING YOUR
CREATIVITY

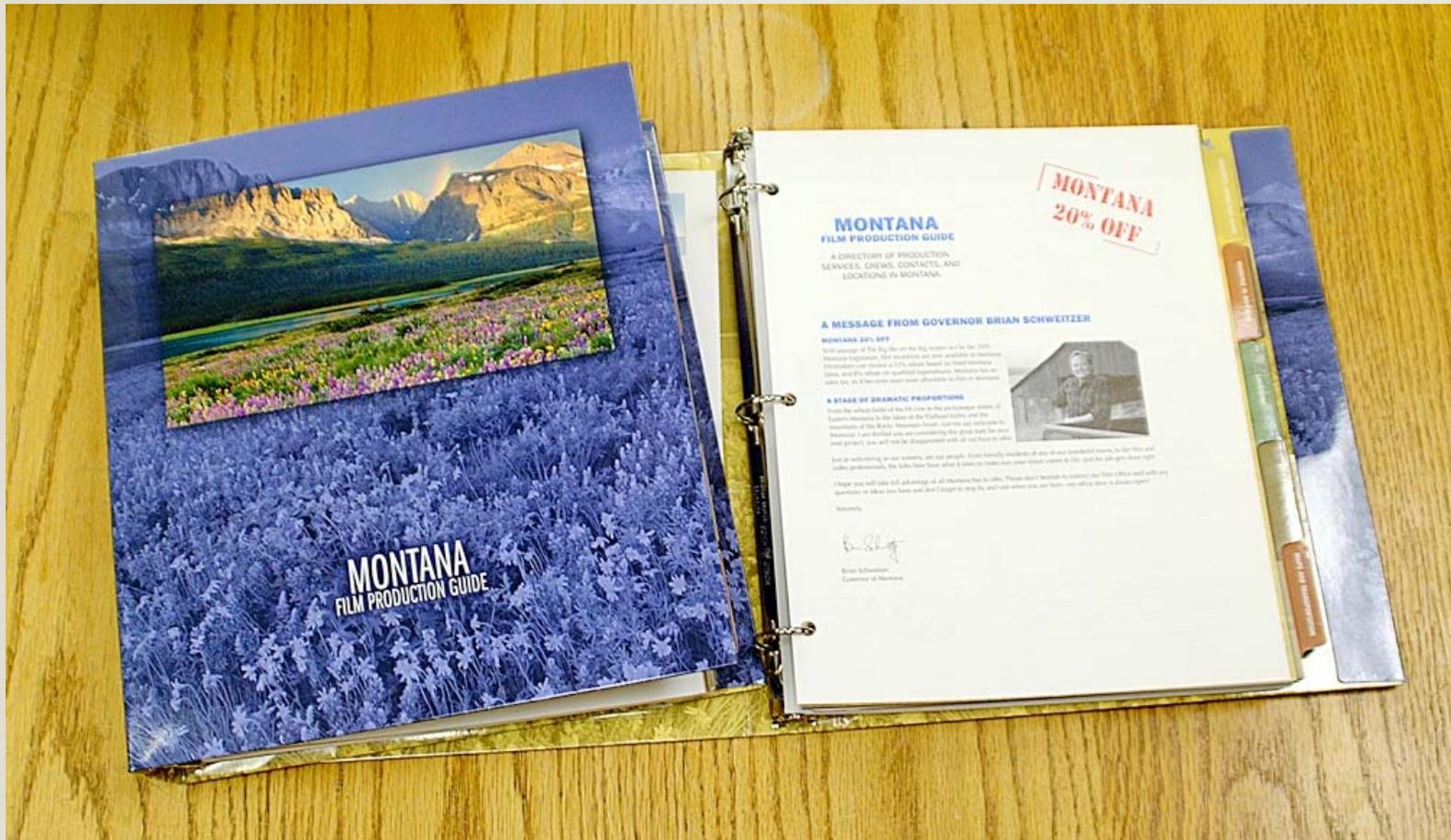
**BIGGER
INCENTIVES**

MONTANA
A BETTER BEHAVIOR OF LOCATION

WWW.MONTANAFILM.COM
800-553-4563

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Montana Production Guide





the Crown of the Continent MapGuide



Geotourism in the Crown of the Continent



Waterton-Glacier International Peace Park

Mapping Character of Place



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BIG SKY COUNTRY

Geotourism

Tourism that sustains or enhances the geographical character of a place—
its environment,
heritage,
aesthetics,
culture,
the well-being
of its residents.



MapGuide projects are a catalyst

Engage diverse local communities to:

- Identify and understand regional character
- Appreciate economic and social benefit
- Educate and celebrate
- Sustain and enhance



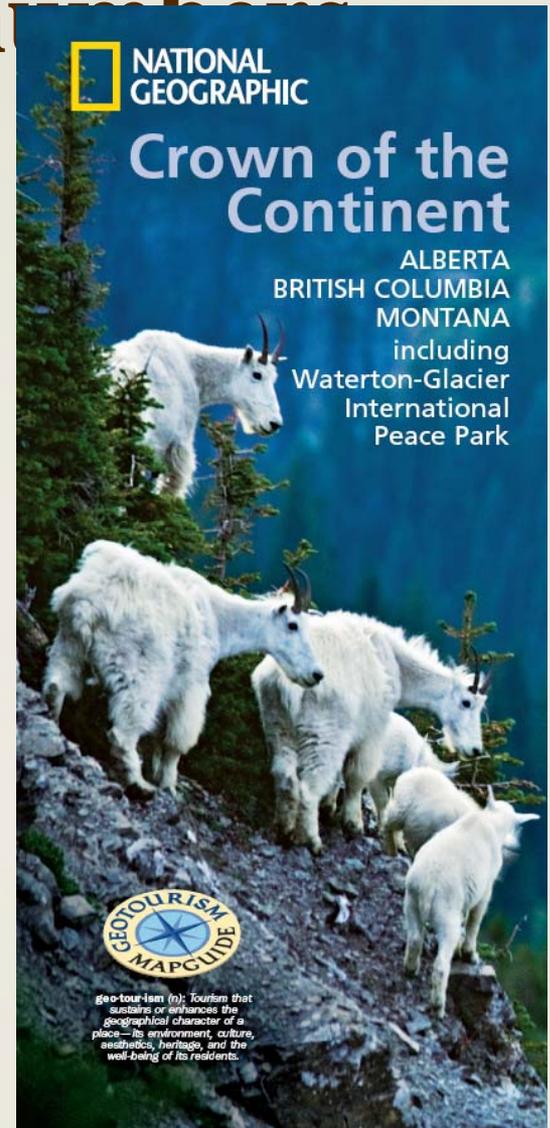
Why the Crown of the Continent?

- One of the world's most diverse temperate ecosystems
- Transboundary tribal heritage
- First international peace park
- Two World Heritage Sites



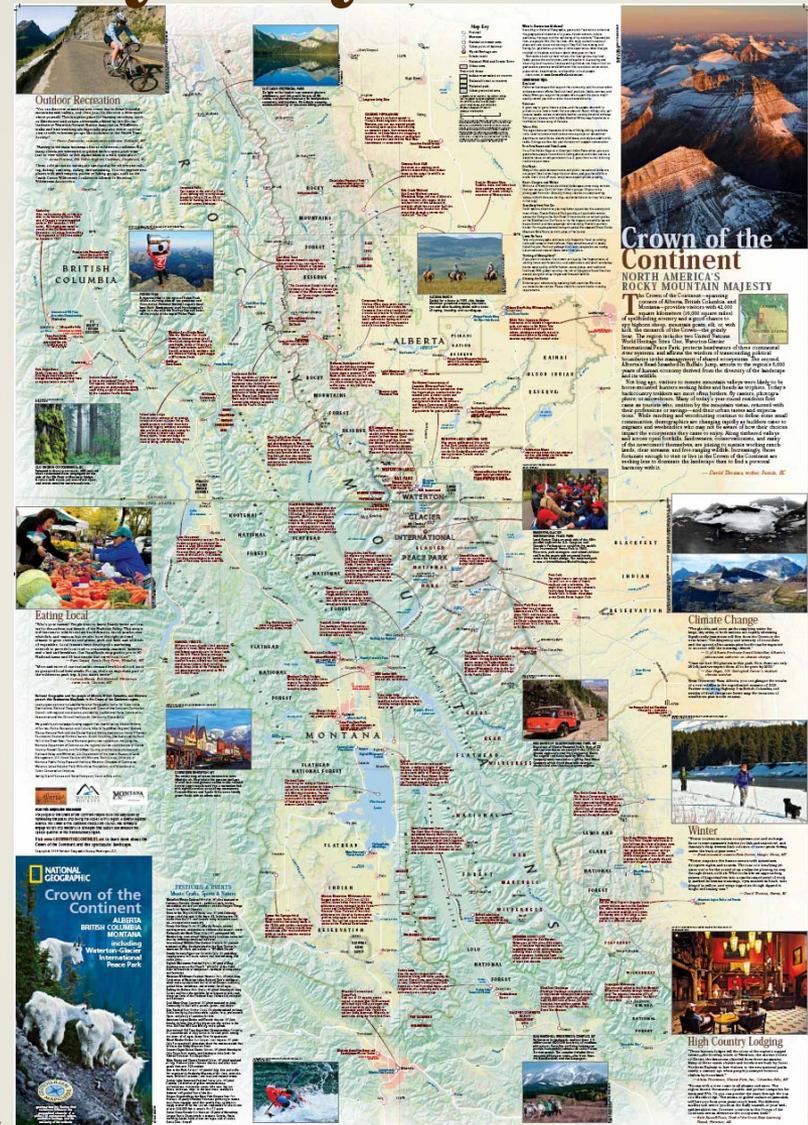
Collaboration by the numbers

- 350 individuals submitted nominations
- Approximately 700 sites, events, topics nominated
- Dozens of media articles
- 64 community forums



The Contemporary Layer

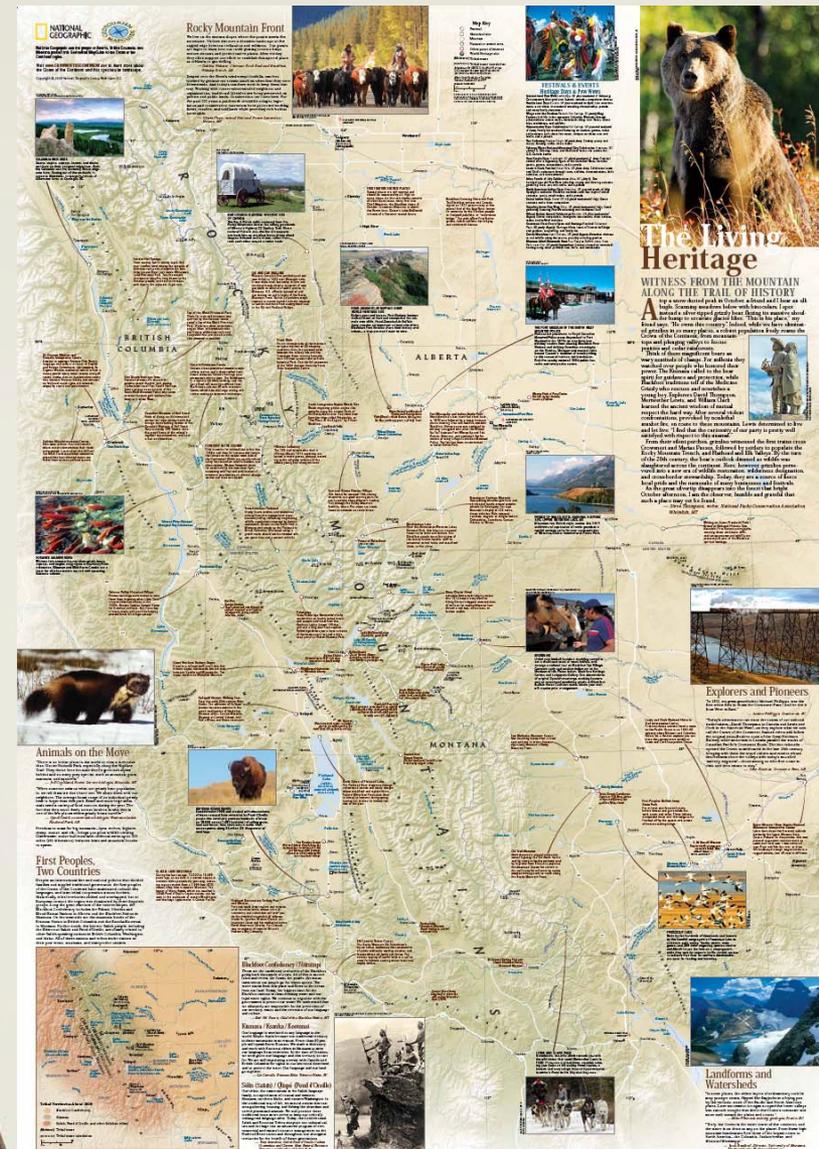
- Communities
- Jurisdictions
- Modern issues
- Stewardship initiatives
- Make a difference



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The Historical Overview

- Map without boundaries
- First nations and tribes
- Natural landscapes
- Working landscapes
- Animals on the move



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BIG SKY COUNTRY

Drill Down, Learn More

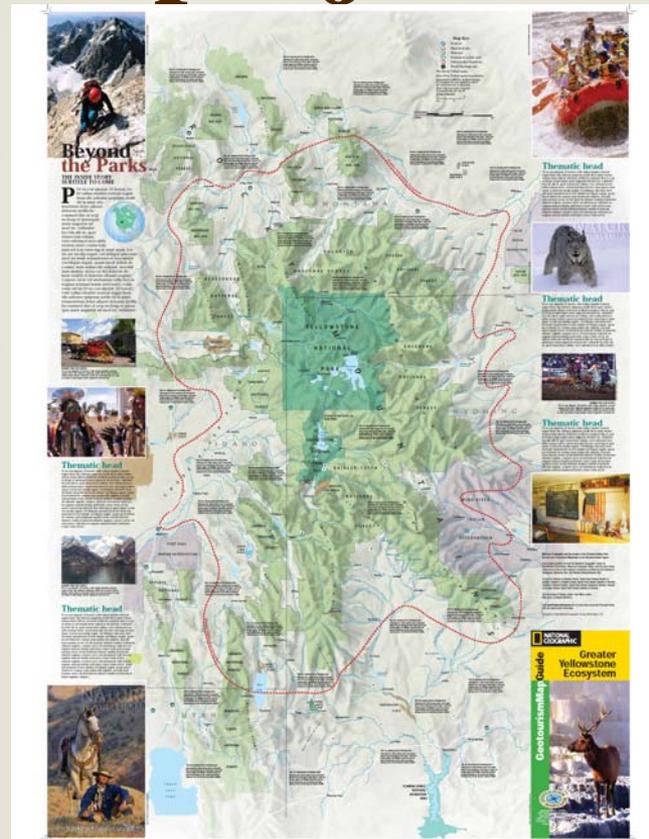
www.crownofthecontinent.net

- Ongoing nominations
- Additional places, experiences and topics
- Content provided by dozens of “field experts”



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Greater Yellowstone mapguide project



<http://www.yellowstonegeotourism.net/home.html>

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Montana Promotion Division · Department of Commerce



Montana Tourism & Recreation Charter





Tourism Charter

- Tourism Advisory Council created and adopted the Charter in the fall of 2007.
- Overarching value statement - a list of guiding principles - encapsulating the goals and actions identified in the new Strategic Plan.





Principles of Charter

- 1. Maintain integrity of place and destination appeal.**
- 2. Promote and highlight the businesses, services and opportunities that are unique to Montana.**
- 3. Promote sustainable resource conservation, conservation of energy, water, wildlife, and uses.**
- 4. Participate in and help lead community stewardship partnerships to maintain Montana assets.**





Principles of Charter

- 5. Identify and appeal to markets that value and seek sustain Montana's distinct character.**
- 6. Foster a diversity of products and services that demand of a demographic cross-section of the market.**
- 7. Ensure visitor satisfaction and an enduring market through education of Montana residents about the sustainable tourism.**
- 8. Work with ITRR, Travel Montana and other tourism organizations throughout the state to evaluate implementation of the Tourism Charter.**





Tourism Charter

- The TAC is inviting Montanans, Montana organizations, communities and government entities to adopt the Charter.
- Information and a template for endorsement can be found at:
www.travelmontana.org/charter/charter.asp

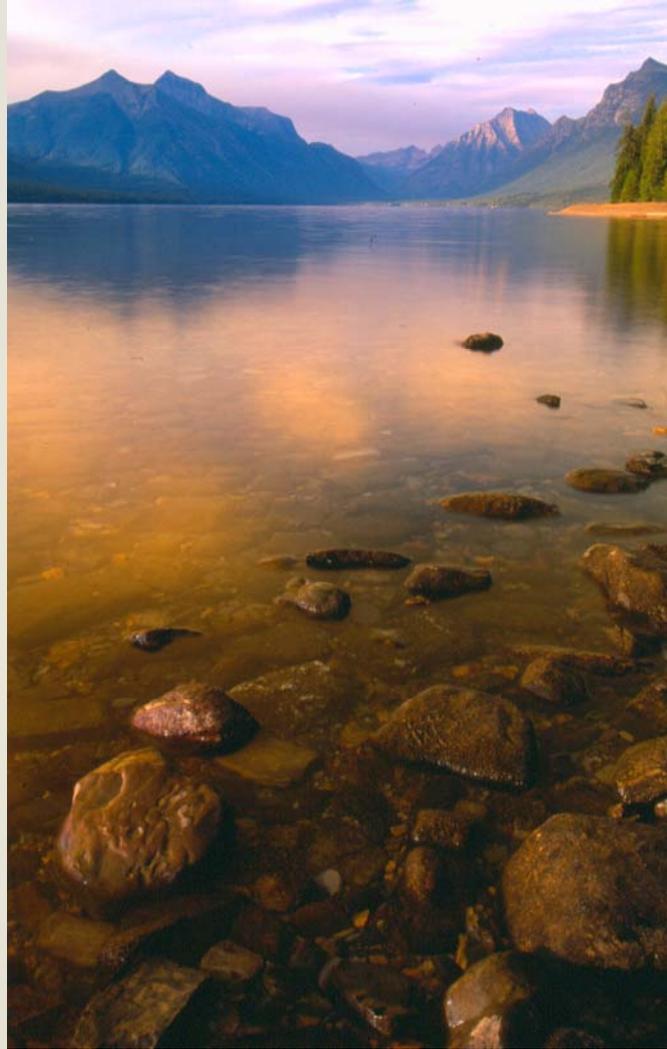




For more information about the tourism
industry in Montana visit:

www.TravelMontana.mt.gov





Thank You



Montana Promotion Division · Department of Commerce